DOCUMENT RESUME

ED 406 914 HE 030 088

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TITLE The Development of a Portfolio Assessment Process for the Bachelor of Business Administration Program at Mount Vernon Nazarene College.
PUB DATE Apr 96
NOTE 194p.
PUB TYPE Reports - Descriptive (141)
EDRS PRICE MF01/PC08 Plus Postage.
DESCRIPTORS *Business Administration Education; Church Related Colleges; Higher Education; Individualized Instruction; *Portfolio Assessment; Portfolios (Background Materials); Program Descriptions; Program Development; Student Evaluation
IDENTIFIERS *Mount Vernon Nazarene College OH

ABSTRACT

This report describes the development of a portfolio assessment process for the bachelor of business administration (BBA) program at Mount Vernon Nazarene College in Mount Vernon, Ohio. The BBA program is designed primarily for working adults. This process was developed by reviewing the literature on portfolio assessment, examining the use of portfolio assessment at 10 institutions of similar size and mission, presenting a working plan to a formative committee at the college, incorporating feedback and presenting the plan to a summative committee, and presenting the plan to the vice president for academic affairs for review and implementation. The portfolio assessment process will allow for three areas to be developed within the BBA curriculum: a variety of individualized learning experiences, shared ownership between the student and instructor of the assessment process, and a format to illustrate the outcomes of the individualized learning experiences. Twelve appendixes provide correspondence related to the research, results of the reviews of portfolio assessment at the 10 institutions, results of the formative and summative committee reviews, and the implementation plan. (Contains approximately 240 references.) (MDM)

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THE DEVELOPMENT OF A PORTFOLIO ASSESSMENT PROCESS FOR THE BACHELOR OF BUSINESS ADMINISTRATION PROGRAM AT MOUNT VERNON NAZARENE COLLEGE

Ronald K. Bolender

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Acknowledgements

I dedicate this project in appreciation to my wife Tamara and my sons, Chadwyck Scott and Eric Chase. They have all been supportive of this endeavor, which required many weekends and evenings of separation.

I also wish to express appreciation to Christie Borland, research assistant. She provided invaluable assistance during crucial points of this project.

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THE DEVELOPMENT OF A PORTFOLIO ASSESSMENT PROCESS FOR THE BACHELOR OF BUSINESS ADMINISTRATION PROGRAM AT MOUNT VERNON NAZARENE COLLEGE

by
Ronald K. Bolender
April, 1996

The Bachelor of Business Administration (BBA) program at Mount Vernon Nazarene College (MVNC) is designed for working adults. One goal is for educational and skill needs to be addressed through the BBA program in preparing the adult learner for current and future work force demands. The problem is that the BBA curriculum falls short in reaching two objectives related to this goal. One objective is to provide a format to develop individualized learning experiences within the BBA program. A second objective is to provide a means by which to clearly illustrate the outcomes of individualized learning experiences beyond the letter grade listed on an academic transcript.

To solve this problem a portfolio assessment process was developed for implementation into the BBA program. The portfolio assessment process is a form of authentic assessment that will

allow for three areas to be developed within the BBA curriculum: (a) a variety of individualized learning experiences, (b) shared ownership (between the adult learner and instructor) of the assessment process, and (c) a format to illustrate the outcomes of the individualized learning experiences.

In this study, three research questions were answered related to the portfolio assessment process in the BBA program. First, what elements can be included in a portfolio assessment process? Second, what elements of the portfolio assessment process should be included in the curriculum of the BBA program? Third, how should faculty be trained to properly use the portfolio assessment process in the BBA program?

Proper implementation of the portfolio assessment process, developed as a result of this project, should lead to a more effective BBA program. The educational process will be improved by delivering a product, in the form of an adult learner, who is better prepared and better able to show improved preparedness to current or prospective employers.

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Chapter 1

INTRODUCTION

Mount Vernon Nazarene College (MVNC) is a church- related coeducational college of arts and sciences that is sponsored and supported by the East Central Educational Region of the Church of the Nazarene, which includes the following geographical areas: (a) Ohio, (b) eastern Kentucky, and (c) West Virginia. It has a student body of over 1,450 and is located in a small rural county in central Ohio.

The traditional residential student, the primary focus at MVNC, accounts for only 20% of all students currently enrolled nationally in higher education (Aslanian, 1993). The primary mission of MVNC (since 1968) is to provide a liberal arts education to traditional residential students. However, nontraditional off-campus students comprise at least 10% of the student body.

Higher education in the United States has experienced a dramatic change in the enrollment mix of traditional and nontraditional students since the inception of MVNC (1966). Nontraditional students represent the fastest growing group of students in higher education. This has been triggered by the need for individuals to receive advanced education to remain employable in the current job market (Brazziel, 1989). "The modern world demands that people learn all through their lives, and increasing numbers of adults, in turn, are demanding access to learning and educational resources" (Thomas, 1991, p. 160).

The term adult learner is used to describe a specific segment of the nontraditional student population. The adult learner is classified as an individual who is over the age of 25 and in some type of formal continuing education (Aslanian & Brickell, 1980). The following characteristics are common for the adult learner: (a) learners are considerably better educated than nonlearners, (b) learners have higher incomes than nonlearners, and (c) employed adults are more likely than unemployed adults to be learners.

In response to the needs of adult learners, a new administrative unit was created at MVNC called the Executive Center for Lifelong Learning (EXCELL). The primary purpose of this division is to offer an accelerated Bachelor of Business Administration (BBA) degree completion program for working adults. Classes for the BBA program were first offered during the 1993-1994 academic year. Currently, there are 116 adult learners enrolled in this program. On January 13, 1995, the Ohio Board of Regents granted approval for MVNC to create an off-campus site for EXCELL in Columbus, Ohio. BBA classes began at that site during September, 1995. The projected enrollment for the Columbus, Ohio, site is 350 adult learners by the end of the 1996-1997 academic year.

Nature of the Problem

The BBA program was developed to help meet the special educational needs of working adults. Building on the adult learner's existing practical knowledge base was a major consideration in the development of the BBA curriculum.

Applicants with two or more years of work experience are admitted into the program. Adults enter the BBA program with a wide variety of skills and educational backgrounds. The BBA curriculum was supposed to be developed to allow for a variety of individualized learning experiences giving the adult learner an option to either enhance an existing area of expertise or to expand into a new skill or content area. The adult learner is to have sufficient ownership of the educational process to achieve this goal within the BBA program. The outcomes of the educational process are to be understood by the adult learner, the instructors, and employers. This requires that the BBA curriculum allow for flexibility, yet provide a standardized format for illustrating the outcomes of individualized learning experiences.

In an attempt to incorporate adult learning elements, the BBA curriculum is different from MVNC's traditional business administration curriculum. From an instructional viewpoint, many of the standard teaching methods or modes used for traditional students were altered or abandoned, such as comprehensive tests, number of lectures, and the amount of traditional classroom instructional time required to earn a semester credit hour. An individualized learning experience is incorporated into the curriculum in the form of a business research project. However, the traditional method of assessing learning and skill development outcomes was retained--the use of the standard grading system. Letter grades are assigned as an indication of the outcome of learning and placed on the adult learner's

transcript. Also, a standardized test is given to the adult learners to measure levels of basic business information at matriculation in the BBA program and then again at graduation. The BBA curriculum is a blend of the traditional business curriculum and adult learning elements.

In meetings reviewing the effectiveness of the BBA curriculum, adult learners and instructors who are part of the BBA program have stated that there was a problem with the curriculum in the area of individualized learning. The problem was that the BBA curriculum falls short in reaching two objectives related to the goal of meeting the special educational needs of working adults. One objective is to provide a format to develop individualized learning within the BBA program. The second objective is to provide a means by which to illustrate clearly the outcomes of the individualized learning beyond the letter grade on a transcript. A formal research project that covers an 18-month period is the only individualized learning experience currently in the program, partially fulfilling these objectives. Individualized learning experiences that cover shorter time periods and that are from a variety of content areas would meet the first objective. The second objective would be fulfilled if these experiences were recorded in a format that illustrated outcomes beyond the traditional letter grade.

For the working adult learner, grades listed on a transcript are a limited medium for indicating learning and skills development. This is also true for instructors as well as current or prospective employers (Kasworm & Marienau, 1993).

Results from standardized tests have limitations in assessing the broad range of learning and skills possessed by the learner (Paulson, Paulson, & Meyer, 1991; Tierney, Carter, & Desai, 1991). Barnett and Lee (1994) state the following:

> Accurately capturing what adults are learning and how their thinking has changed is a challenge for adult educators, whether in higher education, corporate, or other settings in which learning programs for adults occur. To merely document with transcripts or certificates of achievement the courses, seminars, or workshops learners have successfully completed ignores the importance these experiences have on their growth and development. Besides recording the occurrence of these events, adult educators need to assist learners in determining the meaning or relevancy they are deriving from these formal learning experiences. (p. 55)

Based on the concerns stated by both the adult learners and facilitating instructors involved in the BBA program, the vice president for academic affairs at MVNC (see Appendix A) and the investigator of this study determined that the portfolio assessment process needed to be developed and implemented into the BBA curriculum. This process fulfills the objectives of incorporating individual learning experiences into the program and providing a means to illustrate these experiences beyond the traditional grading system.

Purpose of the Project

The purpose of this project was to develop a plan by which the portfolio assessment process could be integrated into the current BBA curriculum. This process will allow for three areas to be developed within the BBA curriculum: (a) a variety of individualized learning experiences, (b) shared ownership of the assessment of individualized learning experiences between the

adult learner and instructor, and (c) a format to illustrate the outcomes of the individualized learning experiences.

Portfolio assessment is a form of authentic assessment that can be used to supplement traditional assessment methods (grades, transcripts, and test scores). Authentic assessment brings both the instructor and adult learner actively into the learning process. The adult learner has ownership of the learning experiences and is an active participant in the assessment process.

The portfolio assessment process includes the following elements: (a) analysis of current and future work force educational and skill needs, (b) analysis of individual learning outcomes, (c) a plan to reach individual outcomes, and (d) an analysis of the attainment of those outcomes. This project allowed EXCELL to assist adult learners in identifying and fulfilling the educational and skill needs of the current and future work force (external environment) through the BBA program via the portfolio assessment process (internal environment).

As a holistic plan, the portfolio assessment process was developed (and will eventually be implemented) to bridge the identification of external needs (current and future work force educational and skill development needs) with an implementation strategy for properly meeting those needs through the internal environment (BBA program). The process of authentic assessment (portfolio) supplements the traditional grading system by documenting individualized learning events occurring within the BBA program.

The vice president for academic affairs at MVNC requested that the portfolio assessment process be explored for implementation into the BBA program. During the fall of 1994, a preliminary review of the literature was conducted by the investigator of this study. The vice president for academic affairs (MVNC) and the investigator of this study decided that the BBA program would benefit by the implementation of the portfolio assessment process. Formal permission was granted (see Appendix A) to pursue this project.

Background and Significance of the Problem

The BBA degree is presented to the general public (via various media presentations) as a program that blends theoretical knowledge with the adult learner's current base of practical experience. Employers often reimburse employees for enrollment in the BBA program with the understanding that it will enhance the employee's contribution to the employer. The implemented portfolio assessment process will allow employers to review the results of the learning process of the individual employee.

Research Questions

The development of a plan to implement the portfolio assessment process into the BBA program at MVNC is the focus of this project. Three research questions will be answered related to portfolio assessment in the BBA program.

1. What elements can be included in a portfolio assessment process? This question focuses on two areas related to the portfolio assessment process. The first area is related to what is suggested by the curriculum literature. The elements included

in the portfolio assessment process used in a variety of educational settings is the second area of focus.

2. What elements of the portfolio assessment process should be included in the curriculum of the BBA program? The results of research question one will be used as a starting point for answering research question two. Due to the variety of portfolio assessment designs, not every possible element will be used for the BBA program. This research question will identify the elements most appropriate for inclusion in the BBA program at MVNC.

3. How should faculty be trained to properly use the portfolio assessment process in the BBA program? This research question will be answered by reviewing training programs developed at other institutions for instructors using the portfolio assessment process. Appropriate components from the various training programs will be considered for inclusion in the faculty training portion of the portfolio assessment process plan for the BBA program.

Definition of Terms

The adult learner is classified as an individual who is over the age of 25 and in some type of formal continuing education. Adult learners have higher income and employment levels as compared to adults not involved in some type of formal continuing education (Aslanian & Brickell, 1980).

Authentic assessment is an evaluation method that brings both the instructor and adult learner actively into the learning process. The student has ownership of the learning process and

applies various instructional activities to real world experiences. This process attempts to start at the adult learner's current level of competency and develop it from that point (Sugarman, Allen, & Keller-Cogan, 1993).

Portfolio is a collection of artifacts resulting from learning activities or skill development generated and selected by the student for inclusion. The artifacts can be in the following formats: (a) written, (b) graphic, (c) audio or video medium, and (d) actual three dimensional project or some representation of it. Portfolio is a form of authentic assessment because both the adult learner and the instructor are actively involved in the learning process (Black, 1993; Lamme & Hysmith, 1991).

Showcase portfolio is a collection of the best work as assessed by the adult learner (in consultation with the instructor). This is the portfolio that is presented to the general public (such as a student's current or prospective employer) to illustrate quality learning representing the adult learner's abilities and scope (Lamme & Hysmith, 1991).

Working portfolio is the complete collection of outcomes from the adult learner's learning activities and development of skills. This portfolio includes outcomes assessed by the adult learner as work in progress ready for a final revision. Inferior outcomes that are not worthy of future revisions are also included (Lamme & Hysmith, 1991).

Chapter 2

REVIEW OF LITERATURE

Overview

The following literature areas have been reviewed for this project: (a) human resource development (current and future work force needs); (b) adult learning; (c) learning styles; (d) curriculum (portfolio assessment); and (e) leadership and management (leadership, decision-making, participatory management, and strategic planning). The leadership and management portion of this review relates to the implementation process of a new concept.

Human Resource Development

The human resource development literature reveals several observations about current human capital needs as well as opinions regarding future needs. The future work force of the United States will need skills that are lacking or underdeveloped in today's work force (Donsky, Cox, & Feiner, 1994; Fierman, 1991; Hewlett, 1991; Loeb, 1994; Miles, 1994; Perry, 1991; Transition from school to work, 1993; Walshok, 1995; Yopp, 1993). Training and education beyond the high school level will be an absolute requirement for the future (Carnevale, 1991; Meister, 1994; Parnell, 1990; Walshok, 1995). There is external pressure from the business world to have these needs met through the formal education system.

The general education curriculum at most colleges has an advantage over most postsecondary technical curricula in that it exposes students to various disciplines thereby allowing them to

expand their thinking and problem-solving capabilities in a variety of directions. Technical curricula tend to be very limited in terms of the variety of disciplines studied. Though problem-solving techniques may be taught, they are very limited in scope. Furtado (1994) states that one of the most important skills needed by adults is the ability to solve problems. This process of solving problems must also be connected to a larger context. The solution to a problem must be viewed with the "big-picture" in mind.

Working for smaller companies (Smith, 1991) and being a long-term contingent worker (Fierman, 1994) are two additional realities that must be addressed in preparing workers for the future. Future workers must be able to adapt to the needs of smaller companies. Due to fewer employees in smaller companies, each person is required to handle more tasks using a variety of skills. Many companies are using temporary (contingent) workers for major positions (not just clerical as in the past). This is referred to as the externalization of the work force (Chuang, 1994; Watkins, 1989). Postsecondary institutions need to prepare future workers to learn how to adjust to this new business culture that is very different from that which the previous generation of workers experienced.

Neither traditional college nor technical curriculums are specifically designed to meet the future needs of society (Coates, Jarratt, & Mahaffie, 1990; Miller, 1993; Recommendations of the committee to study preparation of the workforce, 1991). However, students who graduate from a liberal arts program will

usually be better suited to address future changes in the societal environment (Fierman, 1991). The liberal arts program is more adept at developing workers who can deal with paradoxical decisions. This type of decision will be more common in the future and will have a tremendous impact on the nation's competitive strength (Stroh & Miller, 1994).

There is a need to develop goals and objectives aimed at meeting society's future needs. These concepts can be applied toward both traditional and nontraditional college programs (Perry, 1991).

One goal related to the changing work force is to reshape the postsecondary curricula away from meeting the needs of the Second Wave society toward meeting the needs of the Third Wave society. The Second Wave is related to the Industrial Revolution and the Third Wave is related to the information age (Toffler, 1980). One objective related to this goal is to design new programs that meet specific needs of the seven skill areas outlined by Carnevale, Gainer, and Meltzer (1990) for the Third Wave society: (a) learning to learn, (b) basic competency skills, (c) communication skills, (d) adaptability skills, (e) developmental skills, (f) group effectiveness skills, and (g) influencing skills. A second objective related to this goal is to prepare future workers for the new business culture that is emerging. The majority of future career opportunities will be with smaller companies and a higher percentage of the work force will be classified as contingent (Fierman, 1994; Smith, 1991).

The United States' economy is currently shifting from an economy based on the strength of the muscle to an economy based on the strength of the mind (Toffler, 1990). The ability to take information and understand its relationship to knowledge will be required in the future. Electronic tools such as (a) personal computers, (b) facsimile machines, (c) cellular telephones, (d) electronic mail, (e) scanning devices, (f) telecommunications, (g) two-way television, (h) multiple channel cable systems, (i) worldwide on-line database sources, and (j) various software applications will be used to manipulate information. The future employee will be empowered by these tools (Naisbitt & Aburdene, 1990).

The definition of literacy may change in the future in response to these changing tools. The amount of information communicated by using nonprint methods has had a tremendous influence on the use of the written word (Thomas, 1991; Toffler, 1980). In the past employers have demanded less in terms of literacy skills from a notable number of employees. This has tended to downplay the usefulness of these skills among the nonprofessional world. The concept of literacy will need to be redefined in the future to include not only reading, writing, and mathematical skills but also communication and computer skills. The business world currently views computer skills as a requirement (Filipczak, 1994).

Due to the vast amount of information available to the general public, the translation of information into usable, applicable knowledge will be a much sought after skill (Lynton &

Elman, 1987). Translation of information into knowledge is not limited to theory development in a research university but is also needed in the applied operations of all economic units (such as a small convenience store or landscape service).

The literacy needs of society are changing. Several organizations have been developing new skills through in-house educational programs (Eurich, 1985; Meister, 1994). The question is: Will postsecondary schools change Second Wave programs and curriculum to meet the needs of the Third Wave vocations? Millard (1991) states that reform in higher education has usually been prompted by the external environment. Institutions of higher education tend to be conservative and slow to change. The Servicemen's Readjustment Act of 1944 (GI Bill) was an external action that forced higher education to embrace a sizable portion of society. This action demonstrated that most of society can benefit from some form of higher education.

There is a need to teach students to learn how to learn (Carnevale, Gainer, & Meltzer, 1990; Guglielmino & Guglielmino, 1994; Merriam & Caffarella, 1991; Naisbitt & Aburdene, 1985; Schlossberg, Lynch, & Chickering, 1989). The half-life of the information learned regarding computer and communications tools will be very short. The goal will be to help students visualize the developmental trend of these tools. If they have learned how to learn, basic continuing education programs will keep their skills current. The change in the business culture regarding smaller companies and a contingent work force will require the ability to quickly assimilate new information and skills.

Postsecondary institutions need to create programs that will allow Third Wave literacy skills to be developed throughout one's lifetime. If the right mix of skills can be developed within postsecondary programs, then society will be well served. This would lend credibility to the idea of providing another form of outcome assessment for the portion of the population which has not performed very well in developing traditional test taking skills.

Adult Learning

The second area reviewed for this project was the body of adult learning literature. The area supports the idea that adults as learners approach the process of learning in a different manner compared to a young learner. The common term for teaching children is called pedagogy. This model assigns the teacher the role of deciding what should be taught, when it should be taught, and assessing if the student has sufficiently mastered the lesson. The student is expected to be obedient and is in a passive role except for following the instructions of the teacher (Knowles, 1990).

Andragogy is the teaching of adults. It was previously defined as a method of helping adults learn. Some of the concepts of andragogy have since been successfully used to teach young students. The current definition is as follows:

> To summarize, andragogy is premised on at least these four crucial assumptions about the characteristics of learners that are different from the assumptions on which traditional pedagogy is premised. These assumptions are that as individuals mature: 1) their self-concept moves from one of being a dependent personality toward being a self-directed human being;

> 2) they accumulate a growing reservoir of experience that becomes an increasingly rich resource for learning; 3) their readiness to learn becomes oriented increasingly to the development tasks of their social roles; and 4) their time perspective changes from one of postponed application of knowledge to immediacy of application, and accordingly, their orientation toward learning shifts from one of subject-centeredness to one of performance-centeredness. (Knowles, 1980, pp. 44-45)

There are assumptions about adult learners that set the andragogical model apart from the pedagogical model (Knowles, 1990). The first assumption is that the adult learner needs a reason to undertake new learning. There must be a connection with the real world. If a project is assigned in a particular course, it is helpful if the results of that project can directly benefit the learner outside of the course. There must be life after the grade for the results of the learning activity.

Adults are responsible for their decisions. The second assumption is that adults want to be self-directive in their learning process. This is not always easy to accomplish due to the mentality that comes from early school experiences where they were passive learners.

The third assumption is that adults bring a greater amount of experience with them into the learning process than younger students. Learning activities need to tap into techniques that bring life experience into the classroom. Well-directed discussions nave a different tone with adult students than with younger students. This type of discussion can help the adult learner make connections between life experiences and theoretical models.

Fourth, adults come with a much higher level of readiness to learn than younger students. The maturation process allows the adult learner to see the relevancy of subject matter to the real world application that is not always apparent to the traditional college student.

Adults are oriented to a life-centered approach, viewing theory in relation to life experience. The fifth assumption is that adults are not subject-centered (characteristic of young learners) as much as problem-centered. The subject-centered approach views learning through content of the discipline where the problem-centered technique integrates content and skill from a variety of disciplines. If a problem is stated, adults enjoy learning new material to solve the problem. If a set of procedures or ideas is to be studied without a connection to a real world problem, there is usually frustration for the adult learner in this learning activity.

The final assumption is that adult learners are externally motivated to learning. Although adults are usually in an informal learning mode, it generally takes a tangible external motivation to encourage an adult to return to formal education. Promotions, improved salaries, change in status, and better jobs are the primary external motivations for adult learning.

Cross (1981) advocates another approach to organizing the adult learning model. The characteristics of adults as learners (CAL) framework is made up of two sets of characteristics, personal and situational. The personal characteristics include (a) physiological/aging, (b) sociocultural/life phases, and

(c) psychological/developmental stages. The situational characteristics include part-time learning versus full-time learning and voluntary learning versus compulsory learning. This model frames the complexities of interacting personal and social forces on the adult learner. The complexity is due to the holistic attempt to understand the internal and external forces on the adult learner.

Cross (1981) acknowledges that the assumptions made by the andragogical model are usually, but not always, correct. In comparing a dependent adult and an independent child, one will realize that the andragogical model is simply a reflection of commonly observable differences between adult and child learners.

Both the andragogical and CAL model attempt to understand structurally the adult learning process. Neither is beyond the stage of hypothesizing. Experience indicates that both have merit, but the adult learning process has not been proven in a reliable replicable manner. Andragogy is presented as a set of assumptions. A closely related field dealing with adult learning as a transformation experience is experiential learning.

Kolb (1984) defines experiential learning as ". . . the process whereby learning is created through the transformation of experience" (p. 38). Several characteristics are listed by Kolb (1984) in relation to experiential learning. First, learning is a process rather than a product. Second, learning as a continuous process is grounded in the experience of the student. A third characteristic is that learning is a process of resolving opposing elements of knowledge (abstract versus experiential).

Fourth, learning is a holistic process that involves the total being of the learner. Finally, there is a transactional relationship between the learner and the physical environment. The current state of the environment has a profound impact on the type of current learning process. If the learner eventually changes the environment, then the environment will have a different impact for the next learner.

The adult learner is a prime candidate for the action and reflective modes of learning activities. The action is the real world experience of the adult learner. The reflective mode is the integrating of concepts framed in a mentally disciplined manner with the imperfect world of experience. Brookfield (1986) states:

> This process centers on the need for educational activity to engage the learner in a continuous and alternating process of investigation and exploration, followed by action grounded in this exploration, followed by reflection on this action, followed by further investigation and exploration, followed by further action, and so on. This notion of praxis as alternating and continuous engagements by teachers and learners in exploration, action, and reflection is central to adult learning. It means that explorations of new ideas, skills, or bodies of knowledge do not take place in a vacuum but are set within the context of learners' past, current, and future experiences. (p. 15)

Bloom, Engelhart, Furst, Hill, and Krathwohl (1956) classify reflective learning as an evaluation process. A six class taxonomy of learning objectives lists the evaluation classification as the highest level of learning due to the complexities of mastering the other five classes (knowledge, comprehension, application, analysis, and synthesis) plus adding

the process of value judgment utilizing the cognitive rather than the emotional process. Assessment at this level is difficult and therefore infrequently used at the undergraduate level in college.

King and Kitchener (1994) describe the reflective judgment model as a neglected facet of the critical thinking and reflective learning process. The desired outcome of the educational process is to have adult learners capable of making defensible judgments about vexing problems. It is not satisfactory to simply just bring the adult learner to the stage of critical thinking and reflective learning in the academic setting if the reflective judgment skill has not been considerably improved by the learning experience.

The reflective judgment model has three main categories: (a) pre-reflective thinking, (b) quasi-reflective thinking, and (c) reflective thinking. Pre-reflective thinking does not use evidence to reason toward a conclusion. Reasons given do not appear to be logically connected to the issue. Quasi-reflective thinking stems from recognition of the fact that some problems have elements of uncertainty that eliminate the possibility of reaching simple solutions. The individual has trouble properly using evidence to develop a conclusion. When he/she uses thinking, he/she accepts that knowledge is not a given but must be constructed. While knowledge must be developed from data and evidence, it is always subject to reevaluation. The context in which data and evidence is observed can change the nature of the

knowledge when reevaluated. The goal is to move the adult learner through the reflective thinking stage.

Reflective learning allows the adult learner to learn not only the content but the hows and whys related to the content (Marsick & Watkins, 1991). Action and reflection learning as well as reflective judgment are portions of the experiential learning process that deal with moving the learner from a rote memorizer to a person who can understand and integrate knowledge with experience.

Learning Styles

There is no such thing as one best instructional method for teaching due to the variety of learning styles. Adult learners bring to the instructional experience preferences for different styles of learning (Barbe & Swassing, 1988; Dunn & Dunn, 1978; Guild & Garger, 1985; Hiemstra & Sisco, 1990; Jensen, 1987; Keefe, 1979; Keirsey & Bates, 1984; Kemp, 1971; Lawrence, 1982; McCaulley, 1976; Myers, 1980).

The Myers-Briggs Type Indicator (MBTI) is one of over 30 instruments developed since 1960 that analyze learning styles (Jensen, 1987). The Keirsey Temperament Sorter (KTS) is an abbreviated version of the MBTI (Keirsey & Bates, 1984). Both instruments use identical terms in identifying type indicators. The four dimensions of type indicators are (a) extrovert (E) and introvert (I), (b) sensing (S) and intuitive (N), (c) thinking (T) and feeling (F), and (d) judging (J) and perception (P). The KTS identifies one type indicator for each of the four pairs of dimensions. There are 16 possible combinations of type

indicators ISTJ, ISFJ, ISTP, ISFP, ESTP, ESFP, ESTJ, ESFJ, INFJ, INTJ, INFP, INTP, ENFP, ENTP, ENFJ, and ENTJ (Lawrence, 1982).

Each adult learner can be linked to one of the 16 possible type indicators. The type indicators point toward a preferred learning style. Lawrence (1984) states that the MBTI can predict (a) preferred cognitive patterns, (b) attitudes and interests that influence an area of focus within a learning situation, (c) learning environments compatible with a particular cognitive style, and (d) learning tools most desired and those most avoided.

Differences exist in how adult learners approach learning (Jensen, 1987). For example, adult learners who are sensory (S) approach the test-taking experience differently than intuitive (N) adult learners. The sensory (S) adult learner experiences difficulty in answering theoretical or abstract questions on a test. Answers based on life experiences are used in response to questions as opposed to using inductive thinking. Sensory (S) adult learners tend to reread a question so carefully that in the end it is misread. Points are often lost on tests through the process of changing answers. Intuitive (N) adult learners are usually better test takers than sensory (S) adult learner counterparts. Hunches are trusted which generally produces higher test scores. However, trusting hunches can sometimes lead to carelessness because intuitive (N) adult learners do not always read questions carefully enough to see all the details. Test scores can usually be improved by re-checking their work before turning in a test.

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If a course deals with abstract theoretical material (such as philosophy), what can an instructor do to help the sensory (S) adult learner? If a course deals with arbitrary sequential steps (such as manual bookkeeping), what can an instructor do to help the intuitive (N) adult learner? Kemp (1971) states that these are critical questions which must be addressed when developing instructional units. The unique characteristics of individual learners must be the focus of instructional design. One solution to this problem would be to offer more than one method of evaluation for the course. Allow each adult learner to select an evaluation method best suited for her/his particular learning style.

The intuitive (N) adult learner might benefit by writing a paper which describes how specific bookkeeping functions fit into the overall operations of a company. The sensory (S) adult learner might benefit by working on a project that picks a current ethical issue (such as euthanasia) and attempts to view it from three or four philosophical world viewpoints. It would be especially beneficial for the sensory (S) adult learner if the ethical issue relates to a real life experience, such as a terminally ill grandparent. These assignments might be either in addition to (for extra credit) or as a substitute for a regular exam or in-class assignment.

Learning styles do influence adult learners' ability to learn. The combination of various teaching methods and different cognitive types of subject matter creates diverse needs within a typical course. If learning styles are objectively identified

and a variety of evaluation methods are offered, instructional units can be designed to enhance the learning experience for all types of adult learners.

Curriculum

The third area reviewed for this project was the curriculum literature (specifically authentic assessment). Portfolio assessment (a form of authentic assessment) allows the student an opportunity to display a variety of abilities as well as a broad scope of interest areas utilizing andragogical and experiential learning. Paulson, Paulson, and Meyer (1991) describe portfolio assessment:

> Portfolios offer a way of assessing student learning that is quite different from traditional methods. While achievement tests offer outcomes in units that can be counted and accounted, portfolio assessment offers the opportunity to observe students in a broader context: taking risks, developing creative solutions, and learning to make judgments about their own performances. (p. 63)

The portfolio process changes the way curriculum is developed. Portfolios combine two different functions. One is a measurement tool to document the learner's progress. The other is to provide a means of instruction and learning (Resnick & Resnick, 1993). Individual learning and group needs are acknowledged when portfolio assessment is allowed to be a part of the course work (Viechnicki, Barbour, Shaklee, Rohrer, & Ambrose, 1993). This process can change the way instructors teach. Applying the portfolio process to the traditional curriculum helps instructors become more reflective about the distinct

differences among students. Those individual differences receive more respect and appreciation (Lamme & Hysmith, 1991).

Instructional faculty need training for portfolio assessment to be implemented properly (Abruscato, 1993; Black, 1993; Crouch & Fontaine, 1994). There is a cognitive process involving the student's moving from the working portfolio to the showcase portfolio. The student develops assessing skills to self-determine work that is presentable. More importantly, the student, through the instructor's guidance, learns to determine why a piece is presentable or not (Lamme & Hysmith, 1991). These assessing skills include ". . . making decisions, solving problems, thinking critically, separating fact from opinion, making sense of a barrage of data . . ." (Biemer, 1993, p. 81). Proper portfolio assessment training for the instructors requires more than a one-day in-service meeting (Jones, 1994).

There is not a single best portfolio assessment model (Belanoff & Dickson, 1991; Black, 1993; Edgerton, Hutchings, & Quinlan, 1991; Hutchings, 1993; Paris, Calfee, Filby, Hiebert, Pearson, Valencia, & Wolf, 1992; Tierney, Carter, & Desai, 1991). Even though there is a lack of a single best model, there is a spirit of the portfolio assessment process that must be understood by the instructor as well as the student. Tierney, Carter, and Desai (1991) relay five tenets of the portfolio assessment process. First, students need to be encouraged to see a relationship between instructional activities and the lifelong educational process. Second, students need a sense of ownership of the direction of their learning. The ability to incorporate

learning activities with real world applications is more likely in this process. Third, reading and writing skills are essential building blocks for developing an educated individual. Instructional activities need to be designed to allow full use of these skills. Fourth, diversity (interests, backgrounds, and skills) not only exists among students but is desirable and should be encouraged by various types of learning activities. Fifth, respect between instructors and students must be a mutual concern. Creativity is difficult to encourage without mutual respect. The lack of a single best model is one of the strengths of the portfolio assessment process. It embodies many of the best teaching elements while being adaptable to a variety of programs and courses (Crouch & Fontaine, 1994).

Portfolio or portfolio assessment is a collection of artifacts resulting from learning activities or skill development generated and selected by the student for inclusion. Artifacts are not limited to written or graphic formats. Audio, video, and three dimensional formats are also acceptable (Black, 1993; Lamme & Hysmith, 1991).

The portfolio process moves from a "pack rat" stage to a refined showcase stage. The first stage is called the working portfolio stage. This stage should continue even beyond the formal educational process. The refined stage is called the showcase portfolio. This stage also remains an ongoing process.

Specifically, the working portfolio is the complete collection of outcomes from the student's learning activities and development of skills. This portfolio includes work in progress

as well as outcomes that have been assessed by the student as substandard (Lamme & Hysmith, 1991). This allows the student to take a second look at her/his work and see how to improve future attempts (Sweet, 1993). The working portfolio allows the learner time to gain control of the learning process (Jones, 1994; Wagner, Agnew, & Brock, 1993).

The showcase portfolio is a collection of the best work as assessed by the student (in consultation with the instructor). This is the portfolio that is presented to the general public (such as a student's current or prospective employer) to illustrate quality learning representing the student's abilities (Lamme & Hysmith, 1991).

The portfolio assessment process is more important than the showcase portfolio. The activity of self-assessment and selection is an important cognitive activity and allows the student to integrate experience and theory (Hutchings, 1993). The portfolio logs the development of the student over a period of time ". . . in terms of growth or change in knowledge, skill, and values" (Rogers, 1991, p. 184). The actual portfolio assessment process contributes to the growth of the students as they become the owner of their own learning process (Hetterscheidt, Pott, Russell, & Tchang, 1992). Students have opportunities to reflect on the learning process and to see cognitive growth over a period of time (Valencia, Hiebert, & Afflerbach, 1994).

Tierney, Carter, and Desai (1991) have researched the portfolio assessment process in over 50 instructional settings. The results were encouraging and summarized into 10 points.

First, a wide range of students (from kindergarten to college) were empowered as learners through this process. There was an excitement attached to this learning process.

Second, student ownership of the learning process was real. Students were more aware of their progress across time.

Third, the nature of assessment changes. Instead of a competitiveness between students, the portfolio assessment process encouraged collaboration.

Fourth, external stakeholders were involved in reviewing the progress made by students. This process focuses on parental involvement, but the same concept could be applied to employer involvement. The external stakeholders were able to see achievement over a period of time through this process.

Fifth, interests that are generally outside formal education can be integrated into the portfolio assessment process. Hobbies and other leisure time interests contribute to the educational and skill development of the student.

Sixth, instructors benefit from this process. The portfolio gives a clearer view of the student.

Seventh, there is a holistic assessment of the individual student. The instructor is more fully informed of what the student has achieved.

Eighth, the working portfolio (as well as the showcase portfolio) develops into a chronicle of the student's learning

process. This becomes a very detailed method for recording learning activities.

Ninth, the portfolio is a medium for two important areas of instruction. The learning activities can be student-centered in one of two ways. First, the student may need help in developing a weak academic or skill area. Second, the student learns to self-assess. This skill is very important and yet difficult to develop in the formal educational setting.

Tenth, the portfolio becomes an assessment of the instructor. Both the instructor and administrators are able to review the types of learning activities as well as the results related to the learning objectives prescribed for each course.

Abruscato (1993) asserts that the results from the Vermont portfolio project indicate that the portfolio assessment process is worth pursuing and that instructors need additional orientation and support related to this area. The portfolio assessment process helps the students, instructors, and administrators to identify weaknesses in the current curriculum. The problem-solving element of portfolio assessment indicates that students generally have a limited repertoire of strategies for solving problems. The traditional curriculum is right-answer driven and few students pause to ponder the implications of the problem just solved (even if the correct response was given). The instructors designated to use the portfolio assessment process need an improved orientation on how to use it properly. There is a temptation for instructors to implement the portfolio assessment process as an additional activity that fits into a

highly prescribed structured curriculum. The spirit of the process needs to be properly communicated to both the instructor and the student.

Portfolios cause a tension between validity and reliability in assessment measurements. Validity is best illustrated by the portfolio assessment process because it gives the best picture of what type of learning is actually taking place. It allows for the evaluation of reflective thinking in relation to the course content. The department responsible for curriculum development can more accurately assess the understanding of the subject matter.

The reliability of the assessment is not nearly as good as more traditional forms of assessment. The evaluation of outcomes can vary widely depending upon the various combinations of instructors and students. In the more traditional methods of assessment, such as a multiple-choice test, the reliability of the outcomes can be statistically compared with various groups at various institutions. The portfolio assessment process will never be that reliable. This problem has been minimized by portfolio experts.

Dutt and Kayler (1993) found in an evaluation study that reliability was a problem in the use of the portfolio assessment process at Syracuse University's School of Education. Portfolios were used as a means for the cooperating teachers and university supervisors to evaluate the student teaching experience for education majors. While the study concluded that the portfolio assessment process was beneficial in helping student teachers to

reflect upon their student teaching experience and to synthesize what they had accomplished, there was a lack of consistency in the method of evaluating the student teaching experience.

The Liberal Studies Assessment Portfolio Program at San Diego State University has found similiar results for upper division education majors. "The students who have completed portfolios demonstrated that they can synthesize what they have learned and apply it to new situations. Even though they found the process time consuming and demanding, they are proud of their accomplishments" (Roeder, 1993, p. 5).

A study in authentic assessment was conducted in Hawaii using students in the Kameḥameha Elementary Education Program (KEEP). Using similiar elements found in the portfolio assessment process, the goal was to improve the literacy levels among Hawaiian students. The reliability issue was addressed by the researchers. The conclusion was that the benefits realized from the process of self-assessing one's own literacy outweighted any low test-retest reliability problems. Low reliability is desirable in this senario (Paris, Calfee, Filby, Hiebert, Pearson, Valencia, & Wolf, 1992).

If the goal of assessment is to see how adult learners are actually understanding the subject matter, then reliability can be sacrificed. Elbow (1991) states that ... "the trade-off between getting good pictures of what we are trying to test and good agreement among interpreters of those pictures--it makes most sense to put our chips on validity and allow reliability to suffer" (p. xiii).

In a study conducted at Ball State University, Green and Smyser (1993) found that the portfolio assessment process allowed students to take charge of their professional development. This process influences positive changes concerning evaluation of professional growth and reflective thinking. "Organizing the evidence which documents one's strengths and weaknesses . . . seems to enable students to value planning for professional growth. And, maintaining professional dialogue with peers and mentors apparently creates a more collegial approach to professional development" (Green & Smyser, 1993, p. 17).

One problematic characteristic of the portfolio assessment process is time. To implement the process properly, the instructor is required to review the showcase portfolio and see how it compares to the working portfolio. This makes large scale implementation of the portfolio assessment process difficult (Jones, 1994; Stecher & Hamilton, 1994). The institutions implementing portfolio assessment processes need to consider the time burden as a built-in characteristic.

Even though the portfolio assessment process is time consuming, it can be a valuable experience for the learner. Many institutions of higher education are using various forms of the portfolio assessment process in programs designed for traditional and nontraditional learners. Courts and McInerney (1993) have developed a plan for implementing the portfolio assessment process in an institution of higher education.

First, create a standing committee in the academic department to articulate the specific goals of the program (or

major). Even though this sounds like a redundant exercise, it is surprising how many departments lack clarity in goal definition.

Second, identify faculty members who are interested in implementing the portfolio process in their courses. Do not require reluctant faculty members to adopt this process.

Third, involve other professionals who are not members of your academic division. This might include the writing laboratory director as well as a faculty member from an academic division providing support courses to the major.

Fourth, do not begin with the goal of assessing everything in the major. Identify a few specific goals that are important in the professional development of the major. These are "big-picture" types of goals.

Fifth, communicate on a regular basis via divisional meetings to keep everyone informed on the implementation of the process. Repeated explanations of the purpose of the portfolio assessment process may be required. Do not assume that everyone will comprehend the totality of the process in one meeting. Allow questions and issues to be asked and discussed in divisional meetings.

Sixth, plan for evaluation of the portfolio assessment process as it relates to helping learners fulfill the goals of the major. This may be an enlighting experience for faculty. The evaluation process may show a lack of comprehension even among learners with high grades. Use this experience as a way to improve the curriculum.

Portfolio assessment is a method and process through which andragogical and experiential learning can enhance the adult learning experience. It allows the adult learner to have more control over the outcomes of various learning activities.

Leadership and Management

When implementing a new concept into the academic world, indifference toward that concept can be fatal. It is important to understand how to properly lead faculty toward the acceptance of a new concept.

Haugerud, Little, and Parks (1993) describe the leadership development action plan (LDAP) model. This model has five components: (a) challenging the process, (b) inspiring a shared vision, (c) enabling others to act, (d) modeling the way, and (e) encouraging the heart. The LDAP is a model that synthesizes leadership development and participatory management.

Leadership is defined as ". . . a process that helps direct and mobilize people and/or their ideas" (Kotter, 1990, p. 3). An example of mobilization of followers toward a vision is Bill Gates (president and chief executive officer) as leader at Microsoft (a software development corporation). Deutschman (1992) states that Gates' compelling vision is the driving force at Microsoft. Gates' vision is to transform how people obtain information. This vision gives direction to the organization. The day-to-day operations at Microsoft plus its new product developments mobilize its employees to move toward that vision. It would have been easy for Gates to settle for the early success of MS DOS and to revert into a management only mode. The growth

of Microsoft is following the direction that Gates' vision is pointing toward. This illustrates how leadership differs from management.

Management is involved in planning and budgeting, organizing and staffing, and controlling and problem solving. The purpose of management is to give consistency and order to an organization.

Leadership produces movement by three important subprocesses: (a) establishing direction, (b) aligning people, and (c) motivating and inspiring (Kotter, 1990). The purpose of leadership is to produce change. The three subprocesses of leadership were the focus of this study.

Establishing Direction

"Leadership produces change" (Kotter, 1990, p. 35). Direction setting as opposed to the development of detailed plans is the desired outcome of leadership. Direction setting is translated into strategy development. Strategies possess a level of uncertainty. Management gives consistency and order to an organization. Strategies give direction rather than order.

The process of producing change is not the same as developing a long-range plan. The process of producing change focuses on direction setting. Kemerer, Baldridge, and Green (1982) argue that true strategy development does not follow traditional long-range planning formulas. The first step is to establish direction (vision or goals). After the direction has been established, the process of reaching the vision or goal must

be loose enough to adjust to external and internal environmental changes.

Direction setting involves the rational process of gathering information (Kotter, 1990). Bean (1990) challenges that the institution always needs to be scanning the external environment to find information about external threats and opportunities. The process of strategy development uses the gathered information to give direction to the organization in response to external threats or opportunities. Direction setting does not involve developing a detailed master plan that specifically states what will be done over the next five years. Changes in the external environment seldom allow for that level of certainty about the future (Bean, 1990; Kemerer, Baldridge, & Green, 1982).

Aligning People

Aligning followers toward a new direction is successful only when there is effective communication (Bennis & Nanus, 1985; Kotter, 1990). Communication is a two-way process. Based upon the information gathered concerning the external environment (as well as the condition of the internal environment), the direction may be developed by the leader or both the leader and followers (coworkers). Either process requires a great deal of communication between leader and followers as well as among followers.

Followers need to see on a regular basis that the leader really believes in the direction that has been set. Leaders must lead by example. ". . . behavior creates attitudes, not the reverse" (McCall, 1989, p. 117). Kotter (1990) states that

actions speak louder than words, known as "'walking the talk'" (p. 57). Followers model the actions of the leader (Nielsen, 1993). Kouzes and Posner (1993) state that followers need leaders who will ". . . do what we say we will do -- DWWSWWD" (p.47). This produces the credibility level that a leader has with the followers (Kotter, 1990; Kouzes & Posner, 1993).

Bensimon, Neumann, and Birnbaum (1989) list six categories of leadership theories: (a) trait, (b) power and influence, (c) behavioral, (d) contingency, (e) cultural and symbolic, and (f) cognitive. The contingency category is made up of theories that allow for leadership style to be influenced by both the external environment and the nature of the task at hand. Decision participation is one model listed under the contingency category. The level of decision-making involvement of the followers varies based upon the task at hand. The leader needs to select the correct level of decision-making involvement. Communication is an important key for all levels of decision-making involvement, but the level of participation in the final decision may vary.

Participatory decision making management is one example listed under the decision participation model (Vroom & Jago, 1988). Participatory decision making management involves performing an analysis to determine the best decision making method to be used in a given situation. Autocratic, consultative, and group are the three methods of decision making. These methods blend various levels of information gathering and participation.

The autocratic method allows the leader to make the decision without direct participation from the followers. With the consultative method, followers are asked to provide input regarding a situation. The leader ultimately makes the decision which may or may not be in agreement with the consensus of the followers. The group method allows the followers to make the decision (which may or may not agree with the leader's viewpoint). Under this method the group decision is implemented. The goal is to select a method that produces the most effective decision for the organization. An effective decision is determined by (a) time constraints, (b) responsiveness to customer service issues, (c) allocation of scarce resources, and (d) interest level of employees in the problem at hand.

Vroom and Jago (1988) do not separate leadership from management in their presentation of participatory management. In order to bring about good decisions, a culture must be developed within an organization that allows freedom to choose the best decision making method. In addition, individuals must be trained and developed to lead or manage that process.

If time allows, the group and consultative decision making methods are best for aligning followers. With the consultative method followers may not agree with the final decision, but are asked to give information that will help in making a decision. Followers have had an opportunity to share information they felt was important and in that way have some ownership of the decision.

Vroom and Jago (1988) and Kotter (1990) agree that a culture needs to exist within an organization that allows individuals to develop as participatory decision makers. The skill of making effective decisions can be learned. Using case studies as part of the training, individuals recommend the best decision making methods for various situations. The goal is to help managers and leaders use participatory decision making techniques as often as possible realizing, however, that no one method is best for every situation.

Participatory decision making goes beyond the holding of group meetings. The specific purpose of each meeting must be clearly communicated to the followers (preferably prior to the meeting). In addition, the followers must view the purpose of the meetings as valuable enough to spend their time in participation (Haugerud, 1992, 1993a).

Motivating and Inspiring

Leaders must inspire and motivate followers to pass through obstacles and roadblocks that invariably lie in the path of change. "Motivation over time requires first, that visions and strategies be communicated on a continuous basis, not just once or occasionally" (Kotter, 1990, p. 72).

Gardner (1989) advises leaders to unlock and redirect existing motives in followers. Creating motivation out of thin air is difficult. It is easier to find and align existing motivations in followers that relate to the vision. Empowering followers to act upon existing motivations allows followers to become leaders in their own (although sometimes limited) domains

(Cronin, 1989). Followers who are empowered to make a difference in the organization will (a) feel more responsible for the outcomes of the organization, (b) show more initiative in helping the organization reach its goals, and (c) have greater enjoyment with their participation in the organization (Wellins, Byham, & Wilson, 1991).

Motivation and inspiration passed on from leader to followers are built upon the (a) level of readiness for change among followers (Haugerud, 1993c) and (b) networking and strength of relationships between leader and followers (Haugerud, 1993b; Kouzes & Posner, 1993). Followers must be ready for change. The level of preparation through participatory decision making management and effectiveness of communicating the vision can determine the level of readiness among followers for change. Relational networks enhance communication. Kotter (1990) uses the term thick informal networks. This type of network often does not follow traditional organizational charts. It allows the leader to communicate with any stakeholder who could help or hinder the implementation of the vision. Effective communication creates cooperation among stakeholders toward reaching the vision. This process can alleviate some of the competitiveness among administrative units that is a usual byproduct of the organizational chart design.

Strategic Planning

Strategic planning is a system that combines leadership and management concepts. Leadership combined with participatory

management techniques is required for strategic planning to be properly implemented in an organization.

Strategic planning is aimed at designing a good fit between the processes and outputs of an organization and the societal factors of the external environments in which the organization operates. Societal factors are ever changing; therefore, their influence upon an organization cannot be minimized. External environments are the focus of the organization. The organization's desire is to do the right thing in response to the ever-changing demands found within the external environments as opposed to focusing on doing things right (such as policies, programs, and procedures based upon old demands). The organization views its activities in terms of effectiveness rather than efficiency. The ability to make changes quickly through wise and informed decision-making is perceived as a goal much more worthy than producing a grand master plan covering several years (Baldridge & Okimi, 1982). Strategic planning is a state of mind rather than a plan (Kemerer, Baldridge, & Green, 1982).

Strategic planning must involve the executive officers of the organization (but ought to include many others). Inclusion of all levels of employees into the planning process reduces potential resistance to future change (Ullrich, 1976). When preparing a response to changing societal factors, the organization must be viewed as a whole (Cope, 1981).

Kemerer, Baldridge, and Green (1982) discuss some of the differences between strategic planning and conventional planning.

Strategic planning is conducted by top-level officials while conventional planning is often conducted by a designated planning office. While the planning office may demonstrate more efficiency in the building of a master plan, top-level officials do not own the plan and therefore implementation can be difficult.

Strategic planning has a medium- to short-range time orientation as compared with the long-range time orientation of conventional planning. If the plan remains rigid for 5 to 7 years and the intention is to stay with the plan, changing societal factors of the external environments may be ignored.

Conventional planning tends to focus on the internal environment and organizational needs. Strategic planning scans societal factors first, then reviews the internal environment to ascertain whether changes should be made to meet changing demands. Strategic planning results in critical decisions being made in an attempt to respond to changing societal influences. The product of conventional planning is a master plan or blueprint. Keller (1983) states that strategic planning, unlike conventional planning, is not a bundle of departmental plans compiled and edited into a master plan (a popular exercise in the 1960s). This bottom-up concept attempts to satisfy internal desires and the hopes of several independent departments. Strategic planning takes a holistic approach placing a higher priority on the demands of the external environments over the desires of the internal environment.

Bryson (1988) states that several things have to take place in order for strategic planning to be successfully implemented. First, the administrative cabinet and the president of the institution have to be in agreement over the need for strategic planning and agree to actively participate in the implementation of it. A strategic planning expert (external or internal) should be designated to keep the organization focused on this different style of planning.

Mandates for the institution need to be identified. Institutions are restricted by governmental regulations as well as cultural mores. For example, there are limits to the creativity an organization can use in reorganizing federal financial aid packages. The social mores of the institution and its stakeholders also need to be considered. For example, eliminating required chapel attendance for the traditional residential college student may not be an option for a conservative Christian college.

The mission statement and values of the institution need to be clarified. What is the institutional mission? What values does the mission statement imply? Julliard School does not opt to become a sports management school producing football coaches just because the national trend shifts away from the performing arts (music, drama, and dancing) (Keller, 1983).

Assessing the external environments for opportunities and threats provides the cornerstone for the strategic planning concept. Quantitative and qualitative data should be reviewed to assess current opportunities and threats to the institution posed

by external environments (Goodstein, Nolan, & Pfeiffer, 1993). The design of the strategic planning process is critical to its success, especially with regard to the proper input device (Camillus, 1986). This study can be conducted by using the input device known as the Institutional Societal Factors Inventory (ISFI) process (Varcoe, 1993). Strategic planning is almost useless if this step is not thoroughly implemented. This is the only way to delineate current opportunities and threats.

Assessing the internal environment for strengths and weaknesses is also necessary. A quantitative and qualitative study must be conducted to gain an accurate picture of the strengths and weaknesses found within the institution.

The next step is a summation of the previous five steps. The institution identifies the strategic issues (societal and internal factors) that it is currently facing. Are there new opportunities that ought to be addressed? Are some of the previous opportunities disappearing? What about threats such as new competition, a negative change in the local economy, or the loss of state financial aid for private institutions? What about changes in the strengths and weaknesses of the institution? How will these changes be affected by changes within the external environments?

The next step includes the formulation of strategies for managing the issues. A general plan needs to be outlined in order to give the institution direction; however, it must be brief and flexible. The plan is to give direction but not lay out policies and make 7-year projections. The institution must

be able to make quick changes as the demands of the external environments change. A strategic issue might involve improving dorm life for residential students because a major competitor has upgraded freshman dorms to include such things as air conditioning, microwave ovens, and computers. This issue needs immediate attention. It cannot become part of a 5-year plan with an appointed committee debating whether students really need such an upgrade. If a competitor is identified as a major threat, then the institution cannot afford to wait 5 years to respond.

In the final step strategic planners develop a vision for what the institution should look like based on the previous steps. They must hold this vision in their minds as they implement changes in the organization (including both tangible and intangible areas). They must keep this vision in mind when the art department (who has a declining enrollment and the study of the external environments indicates a declining interest in art as a major) absolutely needs a new state of the art computer driven kiln. The art department may think it is crazy to put microwaves in freshman dormitories when there are academic needs that are yet unfulfilled. The conventional planning method would give the art department the new kiln and wait five years to upgrade the freshman dormitories.

Blending ISFI with strategic planning makes a good combination for working within an educational institution. It helps the institution focus on some important flaws found in conventional planning (Baldridge & Okimi, 1982). The example of the dormitories versus the art department is a good illustration

of a major flaw in the conventional planning method. The needs of academic departments would not have been weighted against external threats. That would not have been a logical pattern of planning using the conventional planning method.

Successful strategic planning depends on personnel who understand both the ISFI process and how it relates to strategic planning. A change of presidents or top level officials could jeopardize the strategic planning process over a period of time. It would be easy to slip into the conventional planning mode because it is so concrete and a 10-year master plan can be developed into a long document with extensive detail. This can be a form of accomplishment for some administrators who like to see tangible evidence of long range plans. A flexible 25-page strategic planning document may not look as impressive to the board of trustees or to outside governmental agencies.

The use of the ISFI process along with the implementation of strategic planning allows educational institutions to make internal corrections promptly. The external societal factors strongly influence the future of an institution. Strategic planning allows the institution to respond positively to external forces.

Summary

The human resource development literature reveals that employers are demanding a greater variety of competencies, skills, and abilities from employees. The work force of the future must be able to learn new concepts and quickly adjust to changes in how business is accomplished. Smaller companies and

downsized departments within larger companies demand each employee to have a broader scope of responsibilities. A growing percentage of the work force will be classified as contingent workers. This group will experience a career of constant learning and change. The portfolio assessment process within the BBA program can assist each adult learner with identifying and achieving some of the competencies, skills, and abilities required for the current and future work force.

The adult learning literature supports the idea that adults approach the learning process in a different manner compared to a young learner. Life experience helps the adult learner to make clear connections between the theoretical model and the real world application. The adult learner is a prime candidate for the action and reflective modes of learning activities that are included in the portfolio assessment process. The action is the real world experience of the adult learner. The reflective mode is the integrating of concepts framed in a mentally disciplined manner with the imperfect world of experience.

Adult learners and young learners both have a variety of learning styles. Each student brings individual preferences to the academic setting in how learning is best achieved. The learning styles literature indicates that the portfolio assessment process provides the variety needed to match more closely those individual preferences. The learner can fulfill learning objectives by choosing methods complimenting a personal learning style.

The curriculum literature review indicates that portfolio assessment is one method that allows individuals to develop across a broad scope of areas and then to demonstrate various competencies to current and prospective employers. This method allows enough flexibility that the formal postsecondary curriculum can be customized to individual interest without losing the discipline of content coverage. This may be the best solution for dealing with the ever changing demands of the work force during the next several decades.

In academia, implementation is usually the greatest challenge to the problem-solving process. General resistance to change, regardless of the problem, is usually the greatest obstacle to implementation. The leadership and management literature illustrates important components for implementing change in an organization: (a) establishing direction, (b) aligning people, (c) motivating and inspiring, and (d) strategic planning. The successful implementation of the portfolio assessment process into the BBA program requires careful attention to these components. All of the components listed above must be utilized for the proper implementation of the portfolio assessment process into the BBA program.

The strategic planning component is not only a part of the implementation process, but is vital to the ongoing enhancement process of the BBA program. The purpose of the portfolio assessment process is to allow adult learners to develop and illustrate competencies, skills, and abilities required by the current and future work force. MVNC must make sure that the

portfolio assessment process is meeting the needs of the work force as it is implemented and then maintained. The strategic planning process allows MVNC to have a continual awareness of how the internal environment is meeting the needs of the external environment. The internal environment is the BBA program and the portfolio assessment process. The external environment consists of companies and the work force. A solution to a problem cannot be static. It must be constantly adjusted to meet the changing demands of the external environment.

The literature review supports the portfolio assessment process as a possible solution to the problem, as investigated in this study, of changing the BBA program to allow for a variety of individualized learning experiences. The leadership and management literature review indicates components to be utilized for the successful implementation of this plan.

Chapter 3

METHODOLOGY AND PROCEDURES

Methodology

This study used the development methodology to design the portfolio assessment process for future implementation into the BBA program. This methodology develops a solution to a problem involving some type of product development such as a plan, program, process, or model. The discipline of scientific inquiry is applied to a research question without the use of a hypothesis or statistical analysis (Robinson & Lorion, 1994). This method was chosen because a problem has been identified that might be solved through the implementation of a properly developed plan.

Procedures

The development methodology requires procedures of scientific inquiry that can be replicated. The following set of procedures were used in this project to develop a plan to implement the portfolio assessment process into the BBA program at MVNC.

The procedure related to the first research question included a literature review of the following areas: (a) human resource development (current and future work force needs), (b) adult learning, (c) learning styles, and (d) curriculum (portfolio assessment). Primary sources for the literature review included: (a) Educational Resources Information Center (ERIC) documents, (b) appropriate professional journals, and (c) required and suggested readings from the syllabi of various

seminars in the higher education program at Nova Southeastern University.

The current and future needs of the work force in the United States were reviewed in the human resources development literature. The characteristics of learning for the adult student were reviewed in the adult education literature. The learning styles literature focused on the individualized learning needs of the adult learner. The curriculum literature was reviewed related to the use of the portfolio process as a tool to assess educational and skill development outcomes. The curriculum literature was a source for various methods of training instructors to properly use the portfolio assessment process.

The portfolio assessment process was reviewed in 10 institutions of higher education. These institutions were identified by the curriculum literature review and professional contacts through informal networks such as fellow professionals at member schools of the Christian College Coalition, Mount Vernon Nazarene College, and Nova Southeastern University. A contact person was selected from each of the 10 institutions selected for review in the project. The contact person was directly in charge of the program using the portfolio assessment process.

A telephone call was made to each prospective contact person. The primary purpose of this call was to determine if the institution is using the portfolio assessment process in any academic program. If not, then that institution was dropped and

another selected through the process described above. Once it was determined that the selected institution uses the portfolio assessment process in an academic program, then a determination was made about the involvement of the prospective contact person in the process. If the prospective contact person was not directly involved in the portfolio assessment process, then that prospective contact person was dropped from the list and another prospective contact person was selected from that institution. The telephone conversation ended with an announcement of a letter to be mailed to the contact person describing the nature of this research project.

A letter was mailed to each contact person. The letter included an introduction of this project and a list of the following items for the contact person to consider regarding the portfolio assessment process: (a) purpose of the portfolio assessment process, (b) how individualized learning is developed through this process, (c) manner in which learning is accomplished, (d) methods for illustrating fulfillment of educational needs and development of skills, and (e) training program for instructors.

A period of at least 7 days passed and the investigator made another telephone call to each contact person. The first part of the conversation reviewed the introduction part of the letter. Then the five items listed for review in the letter were discussed. The conversation closed with two requests. First, that the contact person send any curriculum, program, or evaluation materials related to the institution's use of the

portfolio assessment process. Second, the name of the person in charge of training instructors to use the portfolio assessment process should be forwarded. This is in preparation for answering the third research question.

The data developed from the previous procedures was compared for similarities and differences among the 10 institutions. The results of the literature review of the portfolio assessment process were compared with the results of the investigation of the 10 institutions.

Originally, the third research question was to be answered by reviewing the formal faculty training programs of the 10 institutions selected for research question one. This was not possible due to the fact that none of the selected institutions using the portfolio assessment process had a formal faculty training program. First, none of the institutions had an individual designated as responsible for portfolio faculty training. Second, none had a system of training formal enough to be in written form.

In response to this problem, the Major Applied Research Project (MARP) committee suggested an alternative procedure for answering research question three. Using the same procedure for selecting the 10 institutions reviewed for research question one, an existing faculty portfolio training model was located. A faculty portfolio training program was developed for the BBA program from the curriculum literature review and the faculty portfolio training model. The BBA faculty portfolio training program was evaluated by the summative committee of adult

education experts. One member of the committee has had portfolio assessment faculty training experience. Another member is currently implementing portfolio assessment within a graduate program and has conducted faculty training programs for teaching the adult learner.

The results from research question one and three were incorporated into the document outlining a plan for implementing the portfolio assessment process in the BBA program. Data collected was presented in narrative style, but when appropriate, simple tabulation of numerical data in charts and figures was used.

The next procedure related to research question two. The document outlining a plan for implementing the portfolio assessment process in the BBA program was analyzed by a formative committee. The proposed membership of this committee included the following MVNC faculty members: (a) associate dean of instruction, (b) faculty development committee chairperson, and (c) a faculty member from the traditional program who has written curriculum and taught for the BBA program. This committee reviewed the portfolio assessment process document and made suggestions. The suggestions were considered and a revised portfolio assessment process was developed.

A revised portfolio assessment process document was distributed to a summative committee consisting of adult education experts. The members of this committee consisted of the following: (a) an adult education director from a Church of the Nazarene college using the portfolio assessment process,

(b) an adult education director from a Church of the Nazarene college not using the portfolio assessment process, (c) an adult education director from a college not associated with the Church of the Nazarene system of higher education, and (d) a portfolio assessment process expert. Selected institutions were members of the Christian College Coalition to ensure the use of adult learner professionals familiar with the following MVNC characteristics: (a) mission statement, (b) makeup of the traditional enrollments, and (c) internal faculty resistance related to developing an adult learners program in a traditional liberal arts environment. The fourth member of this committee was a portfolio assessment process expert identified from the curriculum literature review. From the summative evaluation of this committee a final draft was developed and considered ready for implementation into the BBA program.

A presentation of the portfolio assessment process plan to the vice president of academic affairs at MVNC was the final step in this project. Due to the time constraints of the Major Applied Research Project process, implementation and evaluation of this project were beyond this scope of this project. Evaluation of the plan was limited to the summative evaluations of the external committee of adult education experts.

Assumptions

It is assumed that judgments made by the internal and external evaluators as well as the final evaluator will be both reliable and valid with regard to key points contained in the portfolio assessment implementation plan. This project also

makes the assumption that such a plan can be developed (and later implemented) which will solve the problems of properly assessing learning and skill development in the adult learner.

Limitations

The evaluation process used by the internal and external evaluators as well as the final evaluator is subjective in nature. It would be difficult to replicate the same judgment from a group of similar professionals.

Chapter 4

RESULTS

Results of the Literature Review

A literature review was conducted in the following areas: (a) human resource development (current and future work force needs); (b) adult learning; (c) learning styles; (d) curriculum (portfolio assessment); and (e) leadership and management (leadership, decision-making, participatory management, and strategic planning). Primary sources for the literature review included appropriate professional journals, required and suggested readings from the syllabi of seminars in the higher education program at Nova Southeastern University and Educational Resources Information Center (ERIC) documents. The following identifiers were used for searching ERIC documents: (a) adult education, (b) adult learning, (c) adult students, (d) collegiality, (e) educational needs, (f) education work relationship, (g) evaluation, (h)evaluation process, (i) faculty development, (j) faculty promotion, (k) job development, (l) job skills, (m) mentor, and (n) portfolio.

Chapter 2 provides the results of the literature review. The review summarized the current professional options and research related to the portfolio assessment process. The review also identified institutions of higher education utilizing the portfolio assessment process.

Results of the Review of 10 Institiutions

The portfolio assessment process was reviewed at 10 institutions of higher education (see Table 1). The institutions

were identified for selection by the curriculum literature review and professional contacts. The professional contacts included informal networks such as fellow professionals at member schools of the Christian College Coalition, Mount Vernon Nazarene College, and Nova Southeastern University. A contact person was selected from each of the 10 institutions reviewed in this project.

Table 1

Selected Institutions Using the Portfolio Assessment Process

Institution	Contact Person
Alverno University	S. Barkow
Baldwin Wallace	A. Swanson
Bethany College	D. Landon
College of Saint Rose	A. Sheehan
Georgia State University	J. Jones
Hiram College	A. Konick
Miami University	L. Beck
Mid-America Nazarene College	D. Croy
University of Northern Colorado	L. Jackson
University of South Dakota	L. Danielson

Five items related to the portfolio assessment process were identified by the contact person at each institution. Each of these items was described by the contact person in a qualitative format.

The first item related to the purpose of the portfolio assessment process for the specific institution. The portfolio assessment process had more than one use at most institutions. According to the results listed in Table 2, the portfolio assessment process is used for at least one of four reasons: (a) assessment of current learning and competencies, (b) career development, (c) evaluation of academic department, and (d) prior learning assessment.

Table 2

Uses for the Portfolio Assessment Process

Responses	Frequency
Assessment of Current Learning and Competencies	9
Career Development	4
Evaluation of Academic Department	1
Prior Learning Assessment	5

The first purpose was using the portfolios to assess current learning and competencies. Almost every institution listed this as a primary use. A student's achievement of the curriculum or program objectives are assessed through the portfolio process. The portfolio becomes a vehicle to illustrate these achievements.

The second purpose was using the porfolio process for career development. For some institutions this related to using the portfolio as a showcase item for prospective employers. Learning and competencies are able to be illustrated in a more meaningful

manner than simply talking about them or showing a grade on an academic transcript. For example, problem-solving abilities can be easily illustrated by the student to a prospective employer by showing some projects contained within the portfolio. The portfolio also can be developed to achieve a specific career goal, which may include developing an existing career.

Evaluating the academic department was the third purpose listed for the portfolio assessment process. One institution used the portfolio process to determine if the program objectives were being met. The portfolio process was as much an assessment of the success of the department as it was to assess the achievement of the student.

Half of the institutions listed prior learning assessment as a purpose of the portfolio assessment process. The portfolio process is used to determine competencies achieved through life experience. This has two purposes. First, at some institutions, academic credit may be obtained for documented life experience. Second, the showcase portfolio is used to illustrate all achieved competencies.

The second item related to how individualized learning is developed through the portfolio assessment process. In Table 3, the student's individualized learning experiences fell into one of three categories. In the first, some institutions give students a limited amount of choice. Individualized learning is developed within the portfolio assessment process through a prescribed range of choices. The choices are usually defined within the syllabus of the course or courses using the portfolio.

The second category allowed for free choice in some of the individualized learning experiences, while others had similiar restrictions to the first category. In the third category, institutions allowed for free choice of individualized learning experiences as long as a general theme is supported.

Table 3

Student's Individualized Learning Experiences

Responses	Frequency
Limited to a prescribed range of choices	3
Some are limited to a prescribed range of choices, others are not	4
Free choice supporting a general theme	3

The third item related to the manner in which learning is accomplished in the portfolio assessment process. Reflective judgment, content competencies, revision, attainment of learning outcomes, and communication skills were listed as responses to this item by the 10 institutions.

The main advantage to the portfolio assessment process is the use of reflective judgment. A variety of artifacts are contained within a working portfolio. The student can select artifacts that illustrate desired competencies. Usually the selection must be defended to the portfolio advisor. This process allows the student to develop an understanding of connections between artifacts and desired competencies. Student

ownership of the selection process takes the learning experience beyond the normal passive grading process. The student not only selects but gives a justification for the selection.

A course or a major is validated by the portfolio illustration of content competencies. The portfolio is arranged to illustrate an understanding of content. A paper describing an application of a specific management theory illustrates a content competency.

The portfolio process develops revision skills. Revising not only develops writing skills, but the process allows the student to keenly understand the subject covered in the revised artifact. In-depth learning beyond the final grade is possible by the revising process.

The attainment of learning outcomes (individualized and corporate) are achieved through this process. Some of the learning outcomes are prescribed by the course or major and some are customized by the student.

Communication skills are achieved through the portfolio process. Writing skills are achieved through reports and projects (especially when revised). Most institutions use the portfolio process as a way to develop and assess oral communication skills. The showcase portfolio usually requires an oral presentation.

The fourth item relates to methods used to illustrate fulfillment of educational needs and the development of skills. Portfolios usually contain written projects to illustrate fulfillment of educational needs and development of skills. The

following were also listed: (a) audio tape, (b) computer disk, (c) personal mission statement, (d) resume, (e) slides, (f) transcript, and (g) video tape. The audio and video tapes contain students' presentations. The computer disk contains either a program developed by the student or a process best illustrated via computer (such as graphical presentation software).

The fifth item related to the type of training the institution provides to instructors utilizing the portfolio assessment process. None of the 10 institutions had a formal training program (see Table 4). One institution conducts a brief orientation with new faculty for one hour to review the portfolio process. Institutions using a mentoring process did not have it developed into a formal training program. The main purpose of mentoring is for the new faculty member to know where to find answers to questions about the portfolio assessment process.

Training Faculty

Responses	Frequency
Brief Orientation	1
Mentoring	3
None	6

Results of the Review of Training Programs

The procedures related to reviewing formal training programs at the 10 institutions did not produce the expected results.

None of the 10 institutions had an individual responsible for training faculty in how to use the portfolio assessment process. Formal training program documents were not available for review.

The MARP committee suggested developing a BBA faculty portfolio training program from an existing model at another institution as an alternate procedure in response to the research question three predicament. Using the same procedure for selecting the 10 institutions reviewed for research question one, an existing faculty portfolio training model was located at Conestoga College in Toronto, Canada (Conlin, 1995).

Table 4

A faculty portfolio training program was developed for the BBA program from the curriculum literature review and the faculty portfolio training model (see Appendix L). The BBA faculty portfolio training program was evaluated by the summative committee of adult education experts (see Appendix H and Appendix I).

All of the summative committee members stated that the BBA faculty portfolio training program was ready for implementation. The developed program indicates that the curriculum literature had been thoroughly researched.

The training program appears to be comprehensive and practical in design. The success of this training program is highly probable. The greatest concern raised by the summative committee was with the time proximity of training to application. Training that is not used immediately becomes less effective. The facilitating instructors and portfolio advisors should not

receive this training program until a few weeks prior to implementing the portfolio assessment process in the BBA program.

The summative committee stated that the training program appears to be properly designed for the facilitating instructor or portfolio advisor who knows nothing about portfolio assessment. The committee member who has the broadest national scope of experience stated that the next best thing to do is to implement the training program immediately and then make necessary refinements.

The summative committee stated that a sufficient amount of effort and time has been devoted to the BBA faculty portfolio training program. Any procedure, other than implementation and evaluation of the results, would be futile. The BBA faculty portfolio training program is pertinent to the training portion of the plan to implement the portfolio assessment process into the BBA program.

Results of the Formative Committee

A document outlining the results of the review of the 10 institutions and literature review was compiled. This served as a working model for the formative committee. The document outlined the following suggested elements to include in the plan: (a) purpose, (b) analysis of personal competencies and achievements, (c) analysis of current and future work force needs, (d) development of individual learning goals, (e) plan to achieve individual learning goals, (f) analysis of attainment of individual learning goals, (g) artifacts to include in the portfolio, (h) working portfolio, (i) showcase portfolio,

(j) evaluation methods, (k) portfolio advisor, and (l) training. The document also included leadership methods found in the literature review in chapter 2 of this study.

A letter of introduction was sent to each committee member (see Appendix D). This committee served the functions of a formative committee as well as providing internal validation of this plan. The results of the formative committee are found in Appendix E.

The formative committee suggested to clarify and specify the particulars of how the portfolio will be evaluated by faculty. One suggestion was to develop standard evaluation criteria for the portfolio process. The standard criteria should be flexible enough to allow for an individual learning outcome to be covered by more than one course.

The formative committee also suggested that the training portion of the plan be broadened to include specific elements that will help faculty understand the assessment purpose of the portfolio process and how to properly implement the process in the various courses. The portfolio assessment process will increase the work load of faculty. The purpose of this process will be clearly presented in training to justify the additional load.

Leading faculty to adopt a new concept as radical as portfolio assessment was a concern of the formative committee. The committee suggested to clarify some of the leadership concepts and implementation features of the plan.

The suggestions made by the formative committee were incorporated into the plan. The document describing the plan was revised by expanding the evaluation, training, and leadership sections.

Results of the Summative Committee

A revised document was sent to the members of the summative committee along with a letter of introduction (see Appendix F). This committee served the functions of a summative committee as well as providing external validation of this plan.

The results of the summative committee's feedback are found in Appendix G. All of the summative committee members stated that the plan, with a few minor changes, was ready for implementation. The document indicated that the literature had been thoroughly reviewed and properly integrated with the portfolio assessment process review of the 10 institutions. Two additional areas were suggested for inclusion in the literature review, individual learning styles and strategic planning.

One member stated that the term "outcome" should be used in place of "goal" for the individual learning targets. The term goal defines what the adult learner should "be." The term outcome defines what an adult learner should "do" in the portfolio assessment process.

The document was revised by a literature review in learning styles and strategic planning. The use of "outcomes" replaced "goals" for individualized learning targets.

Results of the Implementation Plan Presentation

The revised document (see Appendix K) was presented to the vice president for academic affairs at MVNC. The plan outlined in the document was approved for immediate implementation (see Appendix J).

The vice president for academic affairs suggested that an article be written describing the plan as developed for this study. Once the plan is implemented and tested, the results should be presented at a major adult education conference.

Summary

The plan to implement the portfolio assessment process into the BBA program was developed by obtaining results for each procedure. The procedures related to research question three were changed with the permission of the MARP committee. A faculty portfolio training program for advisors and facilitating instructors was developed as an answer to research question three (see Appendix L).

Chapter 5

DISCUSSION, CONCLUSIONS, IMPLICATIONS, AND RECOMMENDATIONS

Discussion

Research Question One

The first research question for this study was "What elements can be included in a portfolio assessment process?" This question focused on two areas related to the portfolio assessment process. The first area was related to what the curriculum literature (portfolio assessment process). The elements included in the portfolio assessment process used at a variety of educational settings is the second area of focus. Research question one was answered by the combination of the results of the literature review and the review of 10 institutions.

Portfolio elements vary among institutions and among major researchers in the portfolio assessment literature. There is not a single best portfolio assessment model (Belanoff & Dickson, 1991; Black, 1993; Edgerton, Hutchings, & Quinlan, 1991; Hutchings, 1993; Paris, Calfee, Filby, Hiebert, Pearson, Valencia, & Wolf, 1992; Tierney, Carter, & Desai, 1991).

Much of the variation in portfolio elements was influenced by the subject matter and how the portfolio was designed as a requirement within the curriculum. A portfolio developed for a single course usually has a different purpose and set of procedures than one developed for a major or program.

Many institutions use portfolio assessment as a way to develop writing skills within a course. The scope of the

portfolio assessment was within a quarter or semester. The process was limited within the confines of the syllabus.

Many institutions used the portfolio assessment process as a way to go beyond a single course to span either a major or a general education core. The process usually involved multiple readers, with a designated portfolio advisor. The student usually had more flexibility in deciding how to develop the portfolio. Career development portfolios were of this design. The most common were art, business, and education majors. The student was able to reach out beyond the classroom to focus on the major or specific career goal.

Career development is not the primary use of the portfolio assessment process. The literature review and the 10 institution review (see Table 2) bears this out. Yet if the goal is to connect the student to the subject or major area, how better to do that than show how it relates to a desired career goal? The desire to develop an exemplary showcase portfolio is spurred on by the connection to a career goal.

The career development portfolio has specific application to the BBA program. Students need a sense of ownership and direction in learning (Tierney, Carter, & Desai, 1991). The career development type of portfolio allows the adult learner to make connections between the various required subjects within the BBA curriculum and the post BBA career goal.

Research Question Two

Research question two was "What elements of the portfolio assessment process should be included in the curriculum of the

BBA program?" The results of research question one were used as a starting point for answering research question two. Due to the variety of portfolio assessment designs, not every possible element was used for the BBA program. This research question identified the elements most appropriate for inclusion in the BBA program.

Elements that focused on career development were selected from both the literature review and the 10 institutions. These included (a) purpose, (b) analysis of personal competencies and achievements, (c) analysis of current and future work force needs, (d) development of individual learning outcomes, (e) plan to achieve individual learning outcomes, (f) analysis of attainment of individual learning outcomes, (g) artifacts to include in the portfolio, (h) working portfolio, (i) showcase portfolio, (j) evaluation methods, (k) portfolio advisor, and (l) training.

Purpose. The portfolio assessment process in the BBA program must have a well-defined purpose understood by the curriculum writer and facilitating instructor. The purpose must be clearly communicated to the adult learner and the audience reviewing the final portfolio product (such as a prospective employer). The purpose of the portfolio assessment process includes the following statements:

1. to provide a vehicle for self-assessment and purposeful reflection,

2. to use this process as a way to help the adult learner identify current and future work force educational and skill

needs and use individualized learning experiences within the BBA program to meet one or more of those needs, and

3. to document professional self-presentations of the individualized learning experiences within the framework of the BBA program in ways other than a final grade listed on an academic transcript.

Analysis of personal competencies and achievements. Analysis of personal competencies and achievements is another selected portfolio element. The adult learner is to gather and organize materials to develop a narration describing current competencies and past achievements. This narration should also include goals and objectives in the personal and career realms.

Analysis of current and future work force needs. The adult learner analyzes current and future work force needs related to either current employment or a desired area of employment. The analysis is documented in the post BBA career goal proposal and report. The analysis is conducted using the development methodology of scientific inquiry. The current and future work force needs pertaining to an adult learner's career development is the problem for this analysis to solve. A solution to this problem is sought by designing research questions answered by the scientific inquiry of development methodology. The development of this analysis involves a review of related literature and interviews with properly selected experts. The scientific inquiry provides a disciplined approach toward using critical thinking skills to solve the adult learner's problem by analyzing the needs of the current and future work force.

Development of individual learning outcomes. The adult learner will combine the analysis of personal competencies and achievements with the analysis of current and future work force needs in developing a set of individual learning outcomes suitable within the guidelines of the BBA curriculum. The outcomes must allow for flexibility yet provide focused direction. The portfolio advisor will guide the development of these learning outcomes.

Plan to achieve individual learning outcomes. The adult learner will develop a plan to achieve individual learning outcomes. The BBA curriculum will be the framework in which the individual learning outcomes will be achieved. A plan outlining the relationship of individual learning outcomes and the prescribed BBA courses will be developed by the adult learner with the guidance of the portfolio advisor. This plan will help the adult learner and the portfolio advisor to assess the quality of the individual learning outcomes.

Analysis of attainment of individual learning outcomes. The adult learner will provide a summary for each artifact describing how a specific individual learning outcome was achieved. It may take several artifacts to achieve a specific individual learning outcome and an artifact may contribute to more than one individual learning outcome. The adult learner is responsible for this part of the analysis to contribute toward ownership of the portfolio assessment process.

The portfolio advisor will evaluate the adult learner's analysis of the attainment of individual learning outcomes. A

portfolio is not acceptable as a showcase portfolio until all individual learning outcomes have been achieved and presented via the artifacts in the highest quality format. The showcase portfolio is to be a product worthy of both the adult learner and MVNC. The portfolio assessment process is one of completeness rather than a means to earn a letter grade on an academic transcript.

Artifacts to include in the portfolio. Artifacts included in the showcase portfolio are of quality and must support the general career development theme. See Appendix K for a suggested list of artifacts to include in the showcase portfolio

Working portfolio. The working portfolio is the development or "pack rat" stage of the portfolio assessment process. While worthless items should not be included, any item of possible value should be collected. This includes projects and papers that need further revision. One activity of the portfolio assessment process is to encourage the adult learner to revise all projects and papers at least one more time beyond the final grade given by the facilitating instructor within the BBA program.

Showcase portfolio. The showcase portfolio is a collection of the best work as assessed by the adult learner. Each project, paper, and presentation will be preceded by a reflection paper linking it with one or more individual learning outcomes. The showcase portfolio will illustrate the abilities and scope of the adult learner in fulfilling current and future work place needs within the selected career area.

Evaluation methods. The primary purpose of the portfolio assessment process in the BBA program is to assess learning beyond the limitation of a final grade listed on an academic transcript. This poses a problem in how to provide evaluation that holds the adult learner, facilitating instructor, and the institution accountable for insuring that quality learning has led to the proper awarding of earned credit as related to the portfolio process.

Portfolio advisor. The portfolio advisor has two choices for the final evaluation of the showcase portfolio, acceptable and unacceptable. An unacceptable evaluation will require the adult learner to revise the showcase portfolio until it is acceptable. The criteria for an acceptable showcase portfolio include (a) attainment of all learning outcomes, (b) professional appearance of showcase portfolio physical design (binder, tabs, and document quality), (c) proper selection of artifacts, (d) publication quality of all written artifacts (proper grammar and spelling), and (e) professional oral presentation of showcase portfolio related to the adult learner's personal analysis of current and future work force needs.

When properly implemented, the adult learner carries the burden to demonstrate improvement. Revision is an appropriate means for improving working artifacts into credible final products. When the adult learner understands this concept, there is a freedom to seek improvement through active self-criticism.

Each adult learner involved in the portfolio assessment process will be assigned a portfolio advisor. Facilitation,

guidance, and accountability are the portfolio advisor's responsibilities to the adult learner. This is an important element in the portfolio assessment process because advisors will provide motivation and assistance. Each portfolio is an individualized product that requires customization.

Training. Faculty training was identified as a weakness at the 10 institutions listed in Table 1. Some institutions have had some success with informal mentoring and collaborative training. Formal training providing a vision of the portfolio assessment process to teaching faculty and advisors has been minimal. It is interesting to note that much of the literature review highlights the importance of training and that the portfolio assessment process cannot achieve full potential without it.

Research Question Three

Research question three was "How should faculty be trained to properly use the portfolio assessment process in the BBA program?" This research question was to be answered by reviewing training programs developed at other institutions for instructors using the portfolio assessment process. Appropriate components from the various training programs were to be considered for inclusion in the faculty training portion of the portfolio assessment process plan for the BBA program.

The literature review discussed the importance of faculty training for proper implementation of the portfolio assessment process. Instructional faculty need training for portfolio assessment to be properly implemented (Abruscato, 1993; Black,

1993; Crouch & Fontaine, 1994). There is a cognitive process involving the student moving from the working portfolio to the showcase portfolio. The student develops assessing skills to self-determine work that is presentable. More importantly, the student, through the instructor's guidance, learns to determine why a piece is presentable or not (Lamme & Hysmith, 1991). These assessing skills include ". . . making decisions, solving problems, thinking critically, separating fact from opinion, making sense of a barrage of data . . ." (Biemer, 1993, p. 81). Proper portfolio assessment training for the instructors requires more than a one day in-service meeting (Jones, 1994).

The actual use of faculty training was nil in the 10 institutions reviewed. None have formal training programs. There is value in learning on the job, yet a formal training program is necessary to ensure proper implementation of a new learning component. This part of the study was disappointing because the portfolio assessment process was to have a training component based on successful programs from the 10 institutions using the portfolio assessment process.

The MARP committee suggested an alternative for answering research question three. A BBA faculty portfolio training program was developed from the curriculum literature review and the portfolio faculty training model developed by Conlin (1995) at Conestoga College. The BBA faculty portfolio training program was evaluated by the summative committee of adult education experts.

The faculty portfolio training program (see Appendix L) was developed for the portfolio advisor that will be assigned to each adult learner in the BBA program and the facilitating instructors teaching various courses. The training program has eight assignments to be completed prior to the training session.

The first assignment is a brief review of the adult learning and curriculum literature. The curriculum literature review focuses on the portfolio assessment process.

Completing a post BBA career goal worksheet is the second assignment. The BBA business research course requires each adult learner in the BBA program to complete a worksheet related to the post BBA career goal. The worksheet begins the process of developing individual learning outcomes that will be attained in the portfolio assessment process. Portfolio advisors and facilitating instructors will experience this part of the process in the second assignment.

Assignment three is an introductory article giving an overview of the portfolio assessment process as used in the BBA program. The purpose and components of the portfolio assessment process are described.

An article decribing the future work force is assignment four. This includes a description of essential skills employers want and the forces that will reshape work in the future.

The individual learning outcomes, used to evaluate the success of the portfolio assessment process, are developed using scientific inquiry. Assignment five is an article describing the difference between scientific inquiry and general observations.

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Assigment six is an article describing various problem-solving methodologies. The development methodology is used to develop the individual learning outcomes. The portfolio advisor and facilitating instructors need to understand how scientific inquiry and the development methodology are used to develop the evalution criteria for the portfolio assessment process.

Assignment seven is an article describing the importance of the literature review to scientific inquiry. This is a similar article that the adult learner will be required to read in the BBA business research course.

Reviewing the step by step guide for completing the showcase portfolio is assignment eight. The portfolio advisors and facilitating instructors need to understand the entire portfolio assessment process as used in the BBA program.

The training session will include lectures and discussions over the material covered in the eight assignments. There are three objectives for the training session. First, participants should understand the portfolio assessment process and how it is used in the BBA program. Second, participants should understand how individual learning outcomes are developed, implemented, and fulfilled as related to the post BBA career goal. Third, participants should develop a basic understanding of the following areas: (a) scientific inquiry, (b) literature review, and the development research methodology.

Implementation

The implementation section of this plan was drawn from the review of leadership and management literature (leadership,

decision-making, participatory management, and strategic planning). A chapter in the implementation plan included material from this review. The formative and summative committees provided expertise in how leadership relates to implementing a new concept into an existing curriculum or program. Though the scope of this study was limited in providing leadership development, any implementation plan must include leadership and management concepts in the following areas: (a) vision, (b) change theory, (c) decision-making, and (d) strategic planning. New ideas will not be of any value unless properly implemented. Leadership is defined as ". . . a process that helps direct and mobilize people and/or their ideas" (Kotter, 1990, p. 3). The plan included the following leadership components: (a) strategic planning, (b) establishing direction, (c) aligning people, and (d) motivating and inspiring.

Strategic planning. Strategic planning attempts to design a good fit between the processes and outputs of an organization and the external environments in which the organization operates. The ability to make changes quickly through wise and informed decision making is a worthy goal (Baldridge & Okimi, 1982). The introduction of a new concept requires leadership strategy that focuses on the proper way to introduce change into an organization.

Establishing direction. The external environment has changing educational and skill developmental needs for the current and future work force. Each adult learner enrolls in the BBA program with a unique variation of those education and skill

needs. A flexible BBA program (internal environment) is able to respond to the changing external environmental needs for each adult learner while maintaining academic integrity. Strategic planning requires regular scanning of the external environment for opportunities and threats while regularly evaluating how the BBA program can be adjusted to respond positively to those needs.

The process of producing change is not the same as developing a long-range plan. The process of producing change focuses on direction setting. Vision is a form of direction setting. The executive director of EXCELL will present the vision of this new concept of implementing the portfolio assessment process into the BBA program to the EXCELL faculty. This group of faculty is responsible for overseeing the BBA program and therefore must have ownership of this vision. The faculty need to understand that implementing the portfolio assessment process is in response to meeting the needs of the external environment.

Direction setting involves the rational process of gathering information (Kotter, 1990). Direction setting is a response to information gathered about the external and internal environments. The executive director has completed preliminary research as outlined in Chapter 3 of this document. In response to this research a direction has been established by the executive director. It is proper to establish direction (vision), but once the direction has been set it must be loose enough to adjust to external and internal environmental changes. The flexible design of the implementation plan allows for

alterations and improvements as desired by the faculty. EXCELL faculty will probably suggest several alterations to the elements listed in Chapter 3. These changes become the mark of ownership for the EXCELL faculty as they share the vision with non-EXCELL faculty.

Aligning people. Indifference can be fatal to a new concept. Key stakeholders need to actively support the vision for that new concept. Aligning people does not mean that a group of followers line up single file and are ready to be pushed. Instead, aligning means to inspire a sense of vision and shared ownership through which the group develops a sense of inner motivation to adopt and implement a new concept.

For this concept to be adopted at MVNC, it may require support outside of EXCELL. As the EXCELL faculty work with this concept, a decision (through collaborative effort) may be made to add a course or change the existing course structure in the BBA program. This type of action will involve key stakeholders (academic council, EXCELL budget and program development committee, and the MVNC faculty). This is where the sense of ownership and shared vision of the EXCELL faculty will be important and will need to be clearly communicated.

Motivating and inspiring. As the EXCELL faculty work on implementing a portfolio assessment process into the BBA program, it is important to encourage, inspire, and empower. Encouragement is a powerful tool for inspiring coworkers to become involved and feel a sense of ownership of the vision. The executive director needs to look for opportunities to inspire the

EXCELL faculty by giving praise to ideas and accomplishments related to the implementation of this concept. Recognizing individual contributions is one way to empower people.

Inspiration is an excellent way to motivate. To encourage the EXCELL faculty to give the portfolio assessment process a high priority, they must be motivated. Gardner (1989) states that a leader needs to unlock and redirect existing motives in coworkers. It is difficult to create motivation out of thin air. It is easier to find existing motivation and align it toward a vision.

Conclusions

The purpose of this project was to develop a plan by which the portfolio assessment process will be integrated in the current BBA curriculum. The implemented process will allow for three areas to be developed within the BBA curriculum: (a) a variety of individualized learning experiences, (b) shared ownership of the assessment of individualized learning experiences between the adult learner and facilitating instructor, and (c) a format to illustrate the outcomes of the individualized learning experiences (showcase portfolio).

Portfolio assessment is a form of authentic assessment that can be used to supplement traditional assessment methods (grades, transcripts, and test scores). Authentic assessment brings both the instructor and adult learner actively into the learning process. The adult learner has ownership of the learning experience and is an active participant in the assessment process.

The portfolio assessment process will include the elements listed in the implementation plan (see Appendix K). The implemented plan will allow EXCELL to assist adult learners in identifying and fulfilling the educational and skill needs of the current and future work force (external environment) through the BBA program via the portfolio assessment process (internal environment). As a holistic plan, the implemented portfolio assessment process will bridge the identification of external needs (current and future work force educational and skill development needs) by assisting adult learners with meeting those needs through the internal environment (BBA program).

As was expected, a plan was developed that will allow for the portfolio assessment process to be implemented into the BBA program at MVNC. This plan has focused on portfolio elements that are related to career development. The plan also includes leadership components for implementing a new concept into an existing program.

The literature indicated that the portfolio assessment process is a good concept worthy of being included in a curriculum. It also indicated that faculty training is an important component of an implemented portfolio assessment process.

Proper implementation of the portfolio assessment process, developed as a result of this project, should lead to a more effective BBA program. The educational process will be improved by delivering a product, in the form or an adult learner, who is

better prepared and better able to show improved preparedness to current and prospective employers.

Implications

It is expected that through the development of this plan, the portfolio assessment process will be integrated into the BBA program. It is anticipated that the portfolio assessment process, once developed will be implemented giving the adult learner more individualized learning opportunities with outcomes that can be illustrated beyond the letter grade listed on a transcript to current or prospective employers.

The administration at MVNC is willing to allow implementation of a properly designed portfolio assessment process. The vice president for academic affairs at MVNC has expressed a desire to see the portfolio assessment process incorporated into the BBA program (see Appendix A and Appendix J).

EXCELL presents the BBA to prospective students and their employers as an innovative program to help adult learners to become or remain employable. If the portfolio assessment process is properly implemented, this allows both the adult learners and employers to see the visible results that are produced as a result of the BBA process. The implemented portfolio assessment process will help maintain the innovative image of the BBA program to the general public.

Since the portfolio assessment process has been properly developed (and will be implemented), it is expected that MVNC will have a viable means to improve the academic progress of the

BBA adult learners. This will be accomplished by incorporating individualized learning opportunities into the BBA curriculum that can help the adult learner meet the current and future work force demands. The BBA curriculum will be rewritten to blend the identified needs and the assessment of those needs through the portfolio process. The educational process will be improved by delivering a product in the form of an adult learner who is better prepared and better able to show improved preparedness to current or prospective employers.

Recommendations for the Improvement of Practice

This study has provided a plan to implement the portfolio assessment process into the BBA program at MVNC. The implemented plan will serve the needs of adult learners in fulfilling current and future work force needs. This study has provided information on how to develop and implement a portfolio assessment process into an existing curriculum.

Recommendations for the development and implementation of the portfolio assessment process into the BBA program include the following:

1. Through participatory management, EXCELL faculty will have ownership of this project.

2. Other non-EXCELL faculty should be informed and involved in the progress of the implementation.

3. This should serve as a model for other degree completion programs.

4. Formal evaluation of the portfolio assessment process should be developed.

5. The current and future work force needs should be continually monitored by EXCELL.

6. The portfolio assessment process should be modified within the BBA curriculum as the needs of the adult learners change.

The vice president of academic affairs at MVNC has reviewed and approved the plan in Appendix K. In addition, the following will be presented the results of this study: (a) EXCELL faculty, (b) members of the formative and summative committee, and (c) interested non-EXCELL faculty.

A faculty portfolio process training program was developed for the BBA program (see Appendix L). This was accomplished by using an alternate set of procedures for answering research question three. The lack of formal training programs at the 10 institutions reviewed in this study indicates a potential weakness in higher education institutions implementing the portfolio assessment process. Either the literature is incorrect about the importance of training instructors about the proper use of the portfolio assessment process, or a formal training program similar to the one developed in this study should be developed that is easier to implement. Further research is recommended for institutions of higher education in general.

The BBA program at MVNC is under the EXCELL administrative unit. This is an innovative unit, always looking for ways to improve educational practice. The portfolio assessment process will be implemented. As soon as it is implemented, future innovations should be immediately considered, such as the

development of an electronic showcase portfolio, possibly via the Internet.

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APPENDIXES

Appendix A

Vice President for Academic Affairs Authorization Letter

April 27, 1995

Mr. Ronald Bolender
Director of EXCELL

Dear Ron:

Per our conversation during the fall of 1994, I grant you permission to proceed in exploring the possibilities of implementing a portfolio assessment process as part of the Bachelor of Business Administration at Mount Vernon Nazarene College. Institutional resources may be utilized in the project. When the project is completed, plan to give me a formal presentation of your findings.

Sincerely,

Jack D. Anderson, Ph. D.
Vice President for Academic Affairs

JDA/dms

Appendix B

Contact Letter

May 8, 1995

Mr. Lewis Jackson
University of Northern Colorado
McKee Hall
Div. of Special Education
Greeley, CO 80639

Dear Mr. Jackson:

I appreciate the time you took on May 1, 1995 to answer a few questions over the telephone regarding your institution's use of the portfolio assessment process. I am developing a plan to implement the portfolio assessment process into the Bachelors of Business Administration program for adult learners at Mount Vernon Nazarene College. This project is fulfilling a directive from the Vice President for Academic Affairs as well as a research requirement for Nova Southeastern University.

I am interested in how the portfolio assessment process is implemented at your institution. I will contact you in a few days by telephone to discuss the following questions.

What is your institution's purpose of the portfolio assessment process?

How is individualized learning developed through this process?

In what manner is learning accomplished?

What are the methods for illustrating fulfillment of educational needs and development of skills?

What type of training does your institution provide for the instructors utilizing the portfolio assessment process?

Enclosed is a prepaid mailer for you to send any information you wish to share from your institution. If you plan to be out of town in the near future, please consider submitting your answers in writing.

If you have any questions, please call me at 1-800-839-2355. Ask for Ronald Bolender or Christie Borland.

Sincerely,

Ronald Bolender
Executive Director of EXCELL

Appendix C

Results of the Review of 10 Institutions

Institution	Alverno University
Source Identifying Contact or Institution	Franklin University
Why was this Institution or Contact Person Chosen	Dr. Beth Schwarzmueller of Franklin University referred to Alverno University as using portfolio in all of their bachelor's programs.
Contact Person at this Institution for Faculty Development relating to Portfolio Assessment	
Comments	Sandy Barkow seems quite interested in helping.
What is your institution's purpose of the portfolio assessment process?	Portfolios are assessed the semester before student teaching to see if the student is ready to student teach. It allows the community to give its opinion about the student's work.
How is individualized learning developed through this process?	There is a list of things that must be included (resume, reflective writings, etc.) but other than that it is open ended as to what the student wants to include. Alverno University bases learning on 5 principles: (a) conceptualization, (b) diagnosis, (c) coordination, (d) communication, and (e) integrative interaction.
In what manner is learning accomplished?	Students have two advisors. One in the education department and one in the subject area of their concentration. The advisor looks through the portfolio and may suggest revising (but does not make the corrections) before the portfolio is assessed by community members.
What are the methods for illustrating fulfillment of educational needs and development of skills?	Students can showcase their portfolio however they want. Most students write a letter to the assessor labeling where to find certain things. They use various ways of organizing the portfolio including 3-ring binders, leather binders, plastic boxes with dividers, etc. For teaching, the portfolios include a lesson plan and a video tape of the student teaching.
What type of training does your institution provide for the instructors utilizing the portfolio assessment process?	Portfolios are assessed on Saturday morning (1/2 day). On that day, new assessors meet for the first hour with Sandy and possibly students who have been through the portfolio process. Sandy and the students give tips and pointers about what works and what does not. Sandy also has a video for training the assessors.

Institution	Baldwin Wallace
Source Identifying Contact or Institution	Dennis Landon of East Central Consortium
Why was this Institution or Contact Person Chosen	This institution has been using the portfolio assessment process for over 17 years.
Contact Person at this Institution for Faculty Development relating to Portfolio Assessment	A. Swanson
Comments	
What is your institution's purpose of the portfolio assessment process?	Using portfolio assessment process as a means to determine current level of competency.
How is individualized learning developed through this process?	Portfolios are rather structured. Students take a course to learn specifics of portfolio. The portfolio is made up of three parts: (a) narrative of life experiences, (b) learning statements-specifying course asking credit for, and (c) documentation that they had the experience.
In what manner is learning accomplished?	While in the portfolio course, students work with one member of instruction group who gives suggestions along the way. When the course is over, students have six months to complete the portfolio. They are on their own but can receive suggestions from a mentor.
What are the methods for illustrating fulfillment of educational needs and development of skills?	Portfolio is presented in a 3 ring binder with abstracts. The student brings the portfolio to a mentor who signs off on it before it goes to the committee to be evaluated.
What type of training does your institution provide for the instructors utilizing the portfolio assessment process?	Committee members already know how to evaluate portfolio. If members are not familiar with the topic of the portfolio, they may assign it to someone who is familiar with the topic. The committee member who appoints the outside evaluator is responsible for fully acquainting that person with the process.

Institution	Bethany College
Source Identifying Contact or Institution	Richard McCarty (Nova Southeastern University student).
Why was this Institution or Contact Person Chosen	This institution is a leader in using the portfolio process as a way to fulfill course requirements without taking the lecture sections.
Contact Person at this Institution for Faculty Development relating to Portfolio Assessment	
Comments	Dennis Landon is staff co-chair of East Central Consortium (ECC) (not an actual college but a group of colleges). Bethany College is a member of the ECC. This institution has been using the portfolio process for over 25 years. With slow turnover of faculty, most faculty already know how to use portfolio process. New members are mentored.
What is your institution's purpose of the portfolio assessment process?	The portfolio process is primarily used in degree completion programs.
How is individualized learning developed through this process?	Not really individualized except that topics vary. Students must take a course called Portfolio Preparation and follow guidelines for the portfolio process.
In what manner is learning accomplished?	Learning is accomplished through a combination of class and mentoring. There is an advisor for the individual who helps throughout the process.
What are the methods for illustrating fulfillment of educational needs and development of skills?	Generally a 3 ring binder. Sometimes the actual portfolio is bound separately from the documentation. Video and audio tapes have been used lately, however, they are not encouraged.
What type of training does your institution provide for the instructors utilizing the portfolio assessment process?	Instructors are usually faculty and staff who have done some training through KAEL. Most instructors already know how to use the portfolio, so there is no formal training. New members are taught by working with those who already know the process.

Institution	College of Saint Rose
Source Identifying Contact or Institution	Sheehan, A. M., & Dempsey, F. (1991). Bridges to academic goals: A look at returning adult portfolios. In P. Belanoff & M. Dickson (Eds.), Portfolios: Process and product (pp. 113-122). Portsmouth, NH: Boynton/Cook Publishers.
Why was this Institution or Contact Person Chosen	The portfolio process helps adults to make the connections between prior learning and current academic programs.
Contact Person at this Institution for Faculty Development relating to Portfolio Assessment	They do not have on site faculty training. A few faculty members have attended conferences for faculty training in portfolio.
Comments	Very interested in working together.
What is your institution's purpose of the portfolio assessment process?	Used as a way to assess both student and program. Assessing overall success in the program. Assuring that student will have polished portfolios of their best work for academic and professional interviews.
How is individualized learning developed through this process?	Students choose the writings to be included.
In what manner is learning accomplished?	The learning is already accomplished--the portfolio process allows for the proper communication of the learning. Writing and communications skills are developed.
What are the methods for illustrating fulfillment of educational needs and development of skills?	The portfolio is evaluated by more than one person.
What type of training does your institution provide for the instructors utilizing the portfolio assessment process?	No systematic training. On going education through conferences, literature, and in-house discussions.

Institution	Georgia State University
Source Identifying Contact or Institution	Jones, J. E. (1994). Portfolio assessment as a strategy for self-direction in learning. In R. Hiemstra & R. G. Brockett (Eds.), Overcoming resistance to self-direction in adult learning. New Directions for Adult and Continuing Education, (64), 23-29.
Why was this Institution or Contact Person Chosen	The portfolio process allows adult learning to become self-regulated and gain some personal control over the learning process.
Contact Person at this Institution for Faculty Development relating to Portfolio Assessment	
Comments	
What is your institution's purpose of the portfolio assessment process?	Another way to assess student's understanding of the major.
How is individualized learning developed through this process?	Students are allowed to select portfolio's contents within requested competency areas.
In what manner is learning accomplished?	The attainment of learning or skill development goals allows students to continue to work on areas of weakness until those goals are reached.
What are the methods for illustrating fulfillment of educational needs and development of skills?	The portfolio is evaluated on demonstration of specific skills.
What type of training does your institution provide for the instructors utilizing the portfolio assessment process?	None

Institution	Hiram College
Source Identifying Contact or Institution	Dennis Landon of East Central Consortium (Bethany College).
Why was this Institution or Contact Person Chosen	The portfolio process helps adults to make the connections between prior learning and current academic programs.
Contact Person at this Institution for Faculty Development relating to Portfolio Assessment	
Comments	The East Central Consortium (ECC) used the "conference routine" for faculty training in portfolio. Have been working with portfolios for 12-14 years. Assessment--portfolios are read by two assessors who make recommendations to the consortium. The consortium comes to a consensus. Recommends having one portfolio advisor and using an accrediting board (such as ECC) for the evaluation of portfolios.
What is your institution's purpose of the portfolio assessment process?	To help students draw from real world experience.
How is individualized learning developed through this process?	A college course is selected from the catalog and then the student works with fulfilling the syllabus requirements without attending lecture sections.
In what manner is learning accomplished?	An advisor works with the student. When the advisor approves the portfolio, it goes to a committee for final approval. The write and rewrite experience helps the student to develop content competencies and communication skills.
What are the methods for illustrating fulfillment of educational needs and development of skills?	Video tape highlighting presentation of written materials in portfolio.
What type of training does your institution provide for the instructors utilizing the portfolio assessment process?	Mentoring experience with faculty who know the portfolio process.

Institution	Miami University of Ohio's Western College
Source Identifying Contact or Institution	Black, L. C. (1993). Portfolio assessment. In T. W. Banta & Associates (Eds.), Making a difference: Outcomes of a decade of assessment in higher education (pp. 139-150). San Francisco: Jossey-Bass Publishers.
Why was this Institution or Contact Person Chosen	Use portfolios as part of the innovative evaluation of its interdisciplinary academic programs.
Contact Person at this Institution for Faculty Development relating to Portfolio Assessment	
Comments	
What is your institution's purpose of the portfolio assessment process?	To review/evaluate potential of majors. Students present a portfolio for entrance into the program.
How is individualized learning developed through this process?	Portfolios have certain general categories but beyond these students are free to choose from various works they have done. They ask for variety in the portfolios.
In what manner is learning accomplished?	Developed within definition of a course.
What are the methods for illustrating fulfillment of educational needs and development of skills?	Students present a folder or series of slides. Slides are especially for shows or exhibitions.
What type of training does your institution provide for the instructors utilizing the portfolio assessment process?	None

Institution	Mid-America Nazarene College
Source Identifying Contact or Institution	Dr. Dan Croy, faculty member at MANC
Why was this Institution or Contact Person Chosen	Dr. Dan Croy was a presenter at the 1994 MVNC Faculty Institute. He said that MANC is using the portfolio process in the MBA program.
Contact Person at this Institution for Faculty Development relating to Portfolio Assessment	Just beginning faculty development process. No one is responsible for this area.
Comments	
What is your institution's purpose of the portfolio assessment process?	The purpose of the portfolio is "to produce tangible evidence of knowledge and skills acquired through work experience and academic pursuits." The bottom line is our external customers (those organizations who hire and/or promote our graduates) is "what do you bring to our organization?"
How is individualized learning developed through this process?	Students are allowed to create their own format and style of the portfolio. We simply assess their work by looking at our program content and making sure all of it is represented in some way in the portfolio.
In what manner is learning accomplished?	The new paradigm is a rationale related to the knowledge and skill objectives stated for the course is attached to the paper. The student writes the paper and turns it in. The professor grades it according to the prearranged and communicated criteria and makes corrections as well as suggesting areas of the paper that need to be strengthened. The student receives the paper back and begins to make corrections and write a final draft for the portfolio. The final "grade" is assessed by the student when the paper is placed in the portfolio which will be seen by employers and other external customers who will eventually "grade" the "product" of our school -- our graduates.
What are the methods for illustrating fulfillment of educational needs and development of skills?	A compilation of the following: (a) video records, (b) written work, (c) computer disks, and (d) items such as personal mission statements.
What type of training does your institution provide for the instructors utilizing the portfolio assessment process?	There is not a prescribed training program. Most of it is informal.

Institution	University of Northern Colorado
Source Identifying Contact or Institution	Jackson, L., & MacIsaac, D. (1994), Introduction to a new approach to experiential learning. In L. Jackson & R. S. Caffarella (Eds.), Experiential learning: A new approach. New Directions for Adults and Continuing Education, (62), 17-28.
Why was this Institution or Contact Person Chosen	A process model for applying experiential learning in teaching and assessment was developed. Focused on the needs of the adult learner & current work force needs.
Contact Person at this Institution for Faculty Development relating to Portfolio Assessment	
Comments	
What is your institution's purpose of the portfolio assessment process?	Portfolio is only departmental at this time. They use it for performance assessment to see that students are fulfilling requirements. It can also be used as a transition tool for getting a job.
How is individualized learning developed through this process?	1. Advisor/student relationship - there is a shared responsibility for deciding where to focus for improvement. 2. Individual courses have assignments in portfolio that relate to the particular course.
In what manner is learning accomplished?	Students have an advisor who helps along the way. All of the portfolio students are graduate students who use portfolios in the classroom.
What are the methods for illustrating fulfillment of educational needs and development of skills?	It is a portfolio of writings that can also include video tapes and computer disks.
What type of training does your institution provide for the instructors utilizing the portfolio assessment process?	None

Institution	University of South Dakota
Source Identifying Contact or Institution	Urquhart, M. K. & Danielson, L. M. (1993, October). Developing competency in preservice training program through portfolio assessment. Paper presented at the Midwestern Educational Research Association, Chicago, IL.
Why was this Institution or Contact Person Chosen	Portfolios allow for the development of a variety of competencies needed in the work force.
Contact Person at this Institution for Faculty Development relating to Portfolio Assessment	
Comments	Danielson is very interested in helping.
What is your institution's purpose of the portfolio assessment process?	• To demonstrate the development of professional competencies • To showcase professional strengths • To provide evidence of on-going growth • To foster an awareness of one's professional strengths and need for growth • To provide an opportunity to collect artifacts appropriate for professional interviewing
How is individualized learning developed through this process?	Students are encouraged to plan projects and experiences that foster their own professional growth and to include artifacts that reflect their accomplishments. Their strengths as well as areas of on going growth are likely to be different, especially as we consider the emphasis of their studies, field experiences, and related interests.
In what manner is learning accomplished?	The portfolio is to include illustrations of achieved competencies (prescribed). More than one illustration of each competency is acceptable. The student and the faculty committee will monitor the portfolio assessment process.
What are the methods for illustrating fulfillment of educational needs and development of skills?	The final portfolio should include the following: (a) resume and transcript, (b) memberships in professional organizations, (c) video tapes of presentations, and (d) a variety of written projects.
What type of training does your institution provide for the instructors utilizing the portfolio assessment process?	Individual faculty members have initiated the use of portfolios. We have investigated the practice and shared ideas. No formal training has been provided by the institution.

Appendix D

Formative Committee Letter

September 25, 1995

Richard Ryding, Ed. D.
Professor of Religion
Mount Vernon Nazarene College

Dear Dr. Ryding:

I am developing a plan to implement the portfolio assessment process into the Bachelor of Business Administration (BBA) program at Mount Vernon Nazarene College (MVNC). This project is fulfilling a directive from the Vice President for Academic Affairs (MVNC) as well as a research requirement for Nova Southeastern University.

As an experienced BBA curriculum writer, BBA instructor, and traditional instructor your analysis of the attached document, *Plan for implementing a portfolio assessment process in the bachelor of business administration program at Mount Vernon Nazarene College*, would be appreciated. This document is in the formative stage so feel free to write your comments, suggestions, and criticisms on the manuscript. The focus of your analysis should be on Chapters 3 and 4.

Please return this document along with your analysis to me by October 2, 1995. If you would like a copy of the revised document, please write a note of request on the front cover of the manuscript.

Thank you,

Ronald Bolender
Executive Director of EXCELL

Appendix E

Results of the Formative Committee

Associate Dean of Instruction at MVNC

Randie L. Timpe, Ph. D.

"I like the direction of this document."

"Good concept -- portfolio will allow employers to review the results of the learning process of the individual employee."

"Artifacts -- interesting word."

"In the adult learning portion of the literature review, disagree with some of the differences Knowles points out between young and adult learners."

"The showcase portfolio is similar to an artist portfolio."

"Good breadth of contemporary literature."

Experienced Member of the Faculty Development Committee

Sonja J. Smith, Ph. D.

"Showcase portfolio concept is new to me -- interesting distinction."

"In the literature review, disagree with some of the negative references to pedagogical teaching methods as compared to andragogy."

"I'm not clear on why leadership theory is included. Did I miss something. Ahah! The link to leadership is related to the problem with indifference to a new concept."

"Could you discuss the process more?"

"Did you call each college and ask questions via phone? If mail survey, did you get a 100% response? How did you decide on the questions? You have 5 questions -- how did that result in

10 elements? Share analysis of results in detail. Good stuff there."

"Did the institutions send training materials? Could this document include your vision for the training program?"

"Is the analysis of personal competencies and achievements a part of the working and showcase portfolio?"

"So, if a learner can document technology skills, can s/he skip the computer class?"

"Would a comment on the possible integration of knowledge, skills, values beyond one course be valuable? As stated earlier, a learning goal may go beyond one course. Here's a way to evaluate that."

"In the section for statements that might motivate EXCELL faculty to include the portfolio assessment process in the BBA program -- some are principles of adult learning and some seem specific to portfolios."

"How will you draw on leadership theory to do this? Can you be more specific?"

Experienced BBA Curriculum Writer, BBA Instructor, and Traditional Instructor

Richard Ryding, Ed. D.

"Portfolios are valuable as assessment tools ... but a lot more work."

"Faculty, who are already overloaded, will face more work."

"Evaluation measures are cloudy. What will it take? Will it become a stressful compounded experience?"

"You did thorough research and laid out the portfolio concept well."

"Evaluation methods vague -- will there be standared criteria taught to advisors?"

"The portfolio process states that revision is not only okay but acceptable -- good concept."

"Agree with finding that faculty training was a weakness at the 10 institutions."

"Will the portfolio assessment training include content and methods?"

"Chapter 3 does a good job of reviewing elements but begs input into the training and portfolio assessment issues. What is out there to build upon? This is a critical piece and its missing."

"How are the faculty currently aligned toward the portfolio assessment process? On board or fighting it?"

"In response to the summary for leading faculty toward implementing the portfolio assessment process: I guess I differ ... and I have been wrong before. Is the faculty currently working to address the 'more than grades' assessment method? Are they on task with the portfolio assessment now at each step? You're on target by getting them to own a revised edition, but it feels like they may not be on board. Again, I've been wrong often."

Appendix F

Summative Committee Letter

October 9, 1995

Norman G. Wilson, Ph. D.
Houghton College
910 Union Road
West Seneca, NY 14224

Dear Dr. Wilson:

I am developing a plan to implement the portfolio assessment process into the Bachelor of Business Administration (BBA) program at Mount Vernon Nazarene College (MVNC). This project is fulfilling a directive from the Vice President for Academic Affairs (MVNC).

I am requesting your professional advice as Director of the Program for Accelerating College Education (PACE) at Houghton College. Your analysis of the attached document, *Plan for implementing a portfolio assessment process in the bachelor of business administration program at Mount Vernon Nazarene College*, would be appreciated. Please feel free to write your comments, suggestions, and criticisms on the manuscript. The focus of your analysis should be on Chapters 3 and 4.

Please return this document along with your analysis to me by October 16, 1995 in the enclosed prepaid envelope. If you would like a copy of the revised document, please write a note of request on the front cover of the manuscript.

Thank you,

Ronald Bolender
Executive Director of EXCELL

Appendix G

Results of the Summative Committee

Director of the Nontraditional M.B.A. Program at Mid-America Nazarene College

Daniel A. Croy, Ed. D.

(An adult education director from a Church of the Nazarene college using the portfolio assessment process)

"I want to commend you for a thorough and professional job on this project. I was impressed. With your permission I would like to share your report with our division chair for the undergraduate Business Administration program here at MANC."

"The use of the words 'learning goals' may be confusing in the future due to North Central's continued push for 'outcomes'. In Spadey's model the world 'goal' is used to describe how we want students to 'BE'. These are attitudes, values, and subjective perceptions that can only be measured through self-assessment strategies. The word goal in your report may need to be changed to 'outcome.' This word is used when we are talking about what the student can 'DO.'

"I don't remember if I told you our students have a special holder inserted in their 3-ring binders that holds a VHS tape. On this tape are selected videos of presentations the student has made demonstrating their ability to design & evaluate presentations in a variety of settings. You may want to add this to the list of items in the portfolio."

"It is challenging to change the paradigm of faculty to a 'portfolio mindset.' We are still struggling with this. Some

critical incidents have occurred regarding papers. One professor told a class not to summarize the details of a case study because she already was familiar with the case. A student corrected her and said 'but the person reading my portfolio months from now will not be familiar with the case'. They changed the assignment to include a paragraph or two summarizing the details of the case being analyzed for the benefit of the 'portfolio reader'. These kinds of things are happening all the time in the process of improving and updating curricula."

Dean of the School of Graduate and Adult Studies at Olivet Nazarene University

Henry Smith, Ph. D.

Collaborated with Carol Maxon, Director of Admissions and Assessment

(An adult education director from a Church of the Nazarene college not using the portfolio assessment process)

"Impressive!"

"The literature review is very current, thorough and informative."

"You have given remarkable leadership to this worthy assessment option."

"The portfolio is a tool which encourages individual learning styles and the 'multiple intelligences,' cutting edge issues. Perhaps these could also be addressed in the review of the literature."

"'Portfolio' at the selected institutions appears to mean documented learning, an essay on prior learning, as well as the

assessment process you have described in your project. Because this term is used so interchangeably, clarification of the working definition may prevent confusion."

"Regarding artifacts--the list allows for individual learning styles and 'multiple intelligences.'"

"Do the projects, research papers, and presentations options listed in the list of possible artifacts include group projects? Would these demonstrate ability to work in a team?"

"Evaluation methods section of this document -- Excellent! Bravo! A giant step forward in assessment! Yes!"

"Implementation Chapter -- might implementation include goal setting, progress reports, strategic planning, etc.?"

Director of the Program for Accelerating College Education (PACE) at Houghton College

Norman G. Wilson, Ph. D.

(An adult education director from a college not associated with the Church of the Nazarene system of higher education)

"I am really impressed with your comprehensive treatment!"

"You might help the casual reader by listing the seven skill areas on p. 15."

"If this document will be used to orient faculty, you might want to interact some with the learning styles literature in reference to adult learners and teaching methodology."

"My primary question revolves around how faculty will be involved and brought to assume ownership for these changes."

A researcher and author in the area of using portfolios as bridges to academic goals for returning adults

Jean E. Jones, Ph. D.

(A portfolio assessment process expert)

Jones, J. E. (1994). Portfolio assessment as a strategy for self-direction in learning. In R. Hiemstra & R. G. Brockett (Eds.), Overcoming resistance to self-direction in adult learning. New Directions for Adult and Continuing Education, (64), 23-29.

"It appears you have done appropriate research, so the plan should be solid enough to begin. These kinds of projects always require refinement later."

Appendix H

Portfolio Training Summative Committee Letter

January 29, 1996

Henry Smith, Ph.D.
Olivet Nazarene University
Kankakee, IL 60901

Dear Dr. Smith:

I am continuing my work on the plan to implement the portfolio assessment process into the Bachelor of Business Administration (BBA) program at Mount Vernon Nazarene College (MVNC). This project is fulfilling a directive from the Vice President for Academic Affairs (MVNC).

I am requesting your professional advice as head of the adult degree completion program at Olivet Nazarene University. Your analysis of the attached document, *Portfolio Training for Portfolio Advisors and BBA Facilitating Instructors*, would be appreciated. Please feel free to write comments on this letter and keep the manuscript for your records.

There are three questions I would like for you to include in your analysis. Feel free to expand beyond these areas.

- Is the proposed training program outlined in the manuscript acceptable for immediate implementation? Why or why not?

- Is this training program comprehensive enough to make training "stick?"

- For a portfolio advisor or facilitating instructor who knows nothing about portfolio assessment, does this program properly orient the participant?

Please send your analysis to me by February 9, 1996 in the enclosed pre-paid envelope. Please call me at 1-800-839-2355 if you have any questions.

Thank you,

Ronald Bolender
Executive Director of EXCELL

Appendix I

Results of the Summative Committee (Portfolio Training)

Director of the Nontraditional M.B.A. Program at Mid-America Nazarene College

Daniel A. Croy, Ed. D.

(An adult education director from a Church of the Nazarene college using the portfolio assessment process)

"I would encourage you to contact Mark Strenger at Mid-America Nazarene College. He would be interested in the training component. Comprehensive training programs are needed for the proper implementation of the portfolio assessment process."

"I have had countless MBA graduates report to me about the effectiveness of the showcase portfolio for career enhancement. Many have found the portfolio to be the deciding factor for their being hired."

Dean of the School of Graduate and Adult Studies at Olivet Nazarene University

Henry Smith, Ph. D.

Collaborated with Carol Maxon, Director of Admissions and Assessment

(An adult education director from a Church of the Nazarene college not using the portfolio assessment process)

Is the proposed training program outlined in the manuscript acceptable for immediate implementation?

"The training program appears to be thorough and applicable once a format of delivery is determined. It seems faculty acceptance would be a pre-requisite."

Is this training program comprehensive enough to make training "stick?"

"Again, the answer lies in the system. Training 'sticks' as it is immediately implemented. The training program is more than sufficient."

For a portfolio advisor or facilitating instructor who knows nothing about portfolio assessment, does this program properly orient the participant?

"Yes, because you have presented the 'big' picture with the literature review."

Other Comments

"WOW! What an incredible piece of work!"

". . . has done a thorough research of a much needed assessment tool and packaged it into a very practical training program."

"Are your faculty ready for this?"

". . . beware of training which is not closely followed by doing. We fell into this trap with some of our faculty training -- use it or lose it."

Director of the Program for Accelerating College Education (PACE) at Houghton College

Norman G. Wilson, Ph. D.

(An adult education director from a college not associated with the Church of the Nazarene system of higher education)

"Your work is very impressive, and I consider myself honored to be able to interact with you in this way."

". . . most of my suggestions are very minor matters . . ."

A researcher and author in the area of using portfolios as bridges to academic goals for returning adults

Jean E. Jones, Ph. D.

(A portfolio assessment process expert)

Jones, J. E. (1994). Portfolio assessment as a strategy for self-direction in learning. In R. Hiemstra & R. G. Brockett (Eds.), Overcoming resistance to self-direction in adult learning. New Directions for Adult and Continuing Education, (64), 23-29.

"Your project looks ready to implement. I . . . encourage you to being -- and to refine as you go!"

Appendix J

Results of the Implementation Plan Presentation

Vice President for Academic Affairs at Mount Vernon Nazarene College

Jack D. Anderson, Ph. D.

"Very thorough!"

"This is ready to be implemented."

"You should consider writing an article or two about this project."

"Once implemented, consider presenting this concept at a major adult education conference."

Appendix K

Implementation Plan

PLAN FOR IMPLEMENTING A PORTFOLIO ASSESSMENT PROCESS IN THE BACHELOR OF BUSINESS ADMINISTRATION PROGRAM AT MOUNT VERNON NAZARENE COLLEGE

Ronald Bolender

December, 1995

Chapter 1

INTRODUCTION

Mount Vernon Nazarene College (MVNC) is a church related coeducational college of arts and sciences that is sponsored and supported by the East Central Educational Region of the Church of the Nazarene, which includes the following geographical areas (a) Ohio, (b) eastern Kentucky, and (c) West Virginia. It has a student body of over 1,450 and is located in a small rural county in central Ohio.

The traditional residential student which has been the focus at MVNC, accounts for only 20% of all students currently enrolled nationally in higher education (Aslanian, 1993). The primary mission of MVNC (since 1968) is to provide a liberal arts education to traditional residential students. However, nontraditional off-campus students comprise at least 10% of the student body.

Higher education in the United States has experienced a dramatic change in the enrollment mix of traditional and nontraditional students since the inception of MVNC. Nontraditional students represent the fastest growing group of students in higher education. This has been triggered by the need for individuals to receive advanced education to remain employable in the current job market (Brazziel, 1989). "The modern world demands that people learn all through their lives, and increasing numbers of adults, in turn, are demanding access to learning and educational resources" (Thomas, 1991, p. 160).

The term adult learner is used to describe a specific segment of the nontraditional student population. The adult learner is classified as an individual who is over the age of 25 and in some type of formal continuing education (Aslanian & Brickell, 1980). The following characteristics are common for the adult learner: (a) learners are considerably better educated than nonlearners, (b) learners have higher incomes than nonlearners, and (c) employed adults are more likely than unemployed adults to be learners.

In response to the needs of adult learners, a new administrative unit was created at MVNC called the Executive Center for Lifelong Learning (EXCELL). The primary purpose of this division is to offer an accelerated Bachelor of Business Administration (BBA) degree completion program for working adults. Classes for the BBA program were first offered during the 1993-1994 academic year. Currently, there are 116 adult learners enrolled in this program. On January 13, 1995 the Ohio Board of Regents granted approval for MVNC to create an off-campus site for EXCELL in Columbus, Ohio. BBA classes began at that site during September 1995. The projected enrollment for the Columbus, Ohio site is 350 adult learners by the end of the 1996-1997 academic year.

Nature of the Problem

The BBA program was developed to help meet the special educational needs of working adults. Building on the adult learner's existing practical knowledge base was a major consideration in the development of the BBA curriculum. Applicants with two or more years of work experience are admitted into the program. Adults enter the BBA program with a wide variety of skills and educational backgrounds. The BBA curriculum was supposed to be developed to allow for a variety of individualized learning experiences giving the adult learner an option to either enhance an existing expertise or to expand into a new skill or content area. The adult learner is to have sufficient ownership of the educational process to achieve this goal within the BBA program. The outcomes of the educational process are to be understood by the adult learner, the instructors, and employers. This requires that the BBA curriculum allow for flexibility, yet provide a standardized format for illustrating the outcomes of individualized learning experiences.

In an attempt to incorporate adult learning elements, the BBA curriculum is different from MVNC's traditional business administration curriculum. From an instructional viewpoint, many of the standard teaching methods or modes used for traditional students were altered or abandoned, such as comprehensive tests, number of lectures, and the amount of traditional classroom instructional time required to earn a semester credit hour. An individualized learning experience is incorporated into the curriculum in the form of a business research project. However, the traditional method of assessing learning and skill development outcomes was retained--the use of the standard grading system. Letter grades are assigned as an indication of the outcome of learning and placed on the adult learner's transcript. Also a standardized test is given to the adult learners to measure levels of basic business information at matriculation in the BBA program and then again at graduation. The BBA curriculum is a blend of the traditional business curriculum and adult learning elements.

In meetings reviewing the effectiveness of the BBA curriculum, adult learners and instructors who are part of the BBA program have stated that there is a problem with the curriculum in the area of individualized learning. The problem is that the BBA curriculum falls short in reaching two objectives related to the goal of meeting the special educational needs of working adults. One objective is to provide a format to develop individualized learning within the BBA program. The second objective is to provide a means by which to illustrate clearly the outcomes of the individualized learning beyond the letter grade on a transcript. A formal research project that covers an 18 month period is the only individualized learning experience currently in the program, partially fulfilling these objectives. Individualized learning experiences that cover shorter time periods and that are from a variety of content areas would meet the first objective. The second objective would be fulfilled if these experiences were recorded in a format that illustrated outcomes beyond the traditional letter grade.

For the working adult learner, grades listed on a transcript are a limited medium for indicating learning and skills development. This is also true for instructors as well as current or prospective employers (Kasworm & Marienau, 1993). Results from standardized tests have limitations in assessing the broad range of learning and skills possessed by the learner (Paulson, Paulson, & Meyer, 1991; Tierney, Carter, & Desai, 1991). Barnett and Lee (1994) state the following:

> Accurately capturing what adults are learning and how their thinking has changed is a challenge for adult educators, whether in higher education, corporate, or other settings in which learning programs for adults occur. To merely document with transcripts or certificates of achievement the courses, seminars, or workshops learners have successfully completed ignores the importance these experiences have on their growth and development. Besides recording the occurrence of these events, adult educators need to assist learners in determining the meaning or relevancy they are deriving from these formal learning experiences. (p. 55)

The BBA curriculum needs to be enhanced by incorporating a process that will include the following elements: (a) a variety of individualized learning experiences throughout the various content areas, (b) assessment of the individualized learning experiences that allows the adult learner to be involved in the assessment process, and (c) a format that illustrates outcomes of various individualized learning experiences beyond the traditional grading system. Based on the concerns stated by both the adult learners and instructors involved in the BBA program, this process needs to be developed and implemented into the BBA curriculum. This will fulfill the objectives of incorporating individual learning experiences and providing a means to illustrate these experiences beyond the traditional grading system.

Purpose of the Project

The purpose of this project is to develop a plan by which the portfolio assessment process will be integrated into the current BBA curriculum. This process will allow for three areas to be developed within the BBA curriculum: (a) a variety of individualized learning experiences, (b) shared ownership of the assessment of individualized learning experiences between the adult learner and instructor, and (c) a format to illustrate the outcomes of the individualized learning experiences.

Portfolio assessment is a form of authentic assessment that can be used to supplement traditional assessment methods (grades, transcripts, and test scores). Authentic assessment brings both the instructor and adult learner actively into the learning process. The adult learner has ownership of the learning experiences and is an active participant in the assessment process.

The portfolio assessment process will include the following elements: (a) analysis of current and future work force educational and skill needs, (b) analysis of

the individualized learning outcomes, (c) a plan to reach individual outcomes, and (d) an analysis of the attainment of those outcomes. This project will allow EXCELL to assist adult learners in identifying and fulfilling the educational and skill needs of the current and future work force (external environment) through the BBA program via the portfolio assessment process (internal environment).

As a holistic plan, the portfolio assessment process will be developed (and eventually implemented) to bridge the identification of external needs (current and future work force educational and skill development needs) with an implementation strategy for properly meeting those needs through the internal environment (BBA program). The process of authentic assessment (portfolio) will supplement the traditional grading system by documenting individualized learning events occurring within the BBA program.

Background and Significance of the Problem

The BBA degree is presented to the general public (via various media presentations) as a program that blends theoretical knowledge with the adult learner's current base of practical experience. Employers often reimburse employees for enrollment in the BBA program with the understanding that it will enhance the employee's contribution to the employer. The implemented portfolio assessment process will allow employers to review the results of the learning process of the individual employee.

Definition of Terms

Adult learner is classified as an individual who is over the age of 25 and in some type of formal continuing education. The following characteristics are common for the adult learner: (a) learners are considerably better educated than nonlearners, (b) learners have higher incomes than nonlearners, and (c) employed adults are more likely than unemployed adults to be learners (Aslanian & Brickell, 1980).

Authentic assessment is an evaluation method that brings both the instructor and adult learner actively into the learning process. The student has ownership of the learning process and applies various instructional activities to real world experiences. This process attempts to start at the adult learner's current level of competency and develop it from that point (Sugarman, Allen, & Keller-Cogan, 1993).

Portfolio (a form of authentic assessment) is a collection of artifacts resulting from learning activities or skill development generated and selected by the student for inclusion. The artifacts can be in the following formats: (a) written, (b) graphic, (c) audio or video medium, and (d) actual three dimensional project or some representation of it (Black, 1993; Lamme & Hysmith, 1991).

Showcase portfolio is a collection of the best work as assessed by the adult learner (in consultation with the instructor). This is the portfolio that is presented to the general public (such as a student's current or prospective employer) to illustrate quality learning representing the adult learner's abilities and scope (Lamme & Hysmith, 1991).

Working portfolio is the complete collection of outcomes from the adult learner's learning activities and development of skills. This portfolio includes work in progress as well as outcomes that have been assessed by the adult learner as substandard per ability (Lamme & Hysmith, 1991).

Chapter 2

REVIEW OF LITERATURE

Overview

The following literature areas have been briefly reviewed for this project: (a) human resource development (current and future work force needs), (b) adult learning, (c) learning styles, (d) curriculum (portfolio assessment), and (e) leadership and management (leadership, decision-making, participatory management, and strategic planning). The leadership and management portion of this review relates to the implementation process of a new concept.

Human Resource Development

The human resource development literature reveals several observations about current human capital needs as well as opinions regarding future needs. The future work force of the United States will need skills that are lacking or underdeveloped in today's work force (Donsky, Cox, & Feiner, 1994; Fierman, 1991; Hewlett, 1991; Loeb, 1994; Miles, 1994; Perry, 1991; *Transition from school to work*, 1993; Walshok, 1995; Yopp, 1993). Training and education beyond the high school level will be an absolute requirement for the future (Carnevale, 1991; Meister, 1994; Parnell, 1990; Walshok, 1995). There is external pressure from the business world to have these needs met through the formal education system.

Carnevale, Gainer, and Meltzer (1990) state that there are seven skill groups that need to be mastered by the workers of the future: (a) learning to learn, (b) basic competency skills, (c) communication skills, (d) adaptability skills, (e) developmental skills, (f) group effectiveness skills, and (g) influencing skills. The general education curriculum at most colleges has an advantage over most postsecondary technical curricula in that it exposes students to various disciplines thereby allowing them to expand their thinking and problem-solving capabilities in a variety of directions. Technical curricula tend to be very limited in terms of the variety of disciplines studied. Though problem-solving techniques may be taught, they are very limited in scope. Furtado (1994) states that one of the most important skills needed by adults is the ability to solve problems. This process of solving problems must also be connected to a larger context. The solution to a problem must be viewed with the "big-picture" in mind.

Working for smaller companies (Smith, 1991) and being a long term contingent worker (Fierman, 1994) are two additional realities that must be addressed in preparing workers for the future. Future workers must be able to adapt to the needs of smaller companies. Due to fewer employees, each person is required to handle more tasks using a variety of skills. Many companies are using temporary (contingent) workers for major positions (not just clerical as in the past). This is referred to as the externalization of the work force (Chuang, 1994; Watkins, 1989). Postsecondary institutions need to

prepare future workers to handle this new business culture that is very different from what their parents may have experienced.

Neither traditional college nor technical curriculums are specifically designed to meet the future needs of society (Coates, Jarratt, & Mahaffie, 1990; Miller, 1993; *Recommendations of the committee to study preparation of the workforce*, 1991). However, students who graduate from a liberal arts program will usually be better suited to address future changes in the societal environment (Fierman, 1991). The liberal arts program is more adept at developing workers who can deal with paradoxical decisions. This type of decision will be more common in the future and will have a tremendous impact on the nation's competitive strength (Stroh & Miller, 1994).

There is a need to develop goals and objectives aimed at meeting society's future needs. These concepts can be applied toward both traditional and nontraditional college programs (Perry, 1991).

One goal related to the changing work force is to reshape the postsecondary curricula away from meeting the needs of the Second Wave society toward meeting the needs of the Third Wave society. The Second Wave is related to the Industrial Revolution and the Third Wave is related to the information age (Toffler, 1980). One objective related to this goal is to design new programs that meet the specific needs of the seven skill areas outlined by Carnevale, Gainer, and Meltzer (1990) for the Third Wave society. A second objective related to this goal is to prepare future workers for the new business culture that is emerging (Fierman, 1994; Smith, 1991).

The United States' economy is currently shifting from an economy based on the strength of the muscle to an economy based on the strength of the mind (Toffler, 1990). The ability to take information and understand its relationship to knowledge will be required in the future. Electronic tools such as: (a) personal computers, (b) facsimile machines, (c) cellular telephones, (d) electronic mail, (e) scanning devices, (f) telecommunications, (g) two-way television, (h) multiple channel cable systems, (i) worldwide on-line database sources, and (j) various software applications will be used to manipulate information. The future employee will be empowered by these tools (Naisbitt & Aburdene, 1990).

The definition of literacy may change in the future in response to these changing tools. The amount of information communicated by using nonprint methods has had a tremendous influence on the use of the written word (Thomas, 1991; Toffler, 1980). In the past employers have demanded less in terms of literacy skills from a notable number of employees. This has tended to downplay the usefulness of these skills among the nonprofessional world. The definition of literacy will need to be redefined in the future to include not only reading, writing, and mathematical skills but also communication and computer skills. The business world currently views computer skills as a requirement (Filipczak, 1994).

Due to the vast amount of information available to the general public, the translation of information into usable, applicable knowledge will be a much sought after skill (Lynton & Elman, 1987). Translation of information into knowledge is not limited to theory development in a research university, but is also needed in the applied operations of all economic units (such as a small convenience store or landscape service).

The literacy needs of society are changing. Several economic units have been developing new skills through in-house educational programs (Eurich, 1985; Meister, 1994). The question is: Will postsecondary schools change Second Wave programs and curriculum to meet the needs of the Third Wave vocations? Millard (1991) states that reform in higher education has usually been prompted by the external environment. Institutions of higher education tend to be conservative and slow to change. The Servicemen's Readjustment Act of 1944 (GI Bill) was an external action that forced higher education to embrace a sizable portion of society. This action demonstrated that most of society can benefit from some form of higher education.

There is a need to teach students to learn how to learn (Carnevale, Gainer, & Meltzer, 1990; Guglielmino & Guglielmino, 1994; Merriam & Caffarella, 1991; Naisbitt & Aburdene, 1985; Schlossberg, Lynch, & Chickering, 1989). The half-life of the information learned regarding computer and communications tools will be very short. The goal will be to help students visualize the developmental trend of these tools. If they have learned how to learn, simple continuing education will keep their skills current. The change in the business culture regarding smaller companies and a contingent work force will require the ability to quickly assimilate new information and skills.

Postsecondary institutions need to create programs that will allow Third Wave literacy skills to be developed throughout one's lifetime. If the right mix of skills can be developed within postsecondary programs, then society will be well served. This would lend credibility to the idea of providing another form of outcome assessment for the portion of the population which has not performed very well in developing traditional mathematics, reading, writing, or test taking skills.

Adult Learning

The second area reviewed for this project was the body of adult learning literature. The area supports the idea that adults as learners approach the process of learning in a different manner compared to a young learner. The common term for teaching children is called pedagogy. This model assigns the teacher the role of deciding what should be taught, when it should be taught, and assessing if the student has sufficiently mastered the lesson. The student is expected to be obedient and is in a passive role except for following the instructions of the teacher (Knowles, 1990).

Andragogy is the teaching of adults. It was previously defined as a method of helping adults learn. Some of the concepts of andragogy have since been successfully used to teach young students. The current definition is as follows:

> To summarize, andragogy is premised on at least these four crucial assumptions about the characteristics of learners that are different from the assumptions on which traditional pedagogy is premised. These assumptions are that as individuals mature: 1) their self-concept moves from one of being a dependent personality toward being a self-directed human being; 2) they accumulate a growing reservoir of experience that becomes an increasingly rich resource for learning; 3) their readiness to learn becomes oriented increasingly to the development tasks of their social roles; and 4) their time perspective changes from one of postponed application of knowledge to immediacy of application, and accordingly, their orientation toward learning shifts from one of subject-centeredness to one of performance-centeredness. (Knowles, 1980, pp. 44-45)

There are assumptions about adult learners that set the andragogical model apart from the pedagogical model (Knowles, 1990). The first assumption is that the adult learner needs a reason to undertake new learning. There must be a connection with the real world. If a project is assigned in a particular course, it is helpful if the results of that project can directly benefit the learner outside of the course. There must be life after the grade for the results of the learning activity.

Adults are responsible for their decisions. The second assumption is that adults want to be self-directive in their learning process. This is not always easy to accomplish due to the mentality that comes from early school experiences where they were passive learners.

The third assumption is that adults bring a greater amount of experience with them into the learning process than younger students. Learning activities need to tap into techniques that bring life experience into the classroom. Well-directed discussions have a different tone with adult students than with younger students. This type of discussion can help the adult learner make connections between life experiences and theoretical models.

Fourth, adults come with a much higher level of readiness to learn than younger students. The maturation process allows the adult learner to see the relevancy of subject matter to the real world that is not always apparent to the traditional college student.

Adults are oriented to a life-centered approach, viewing theory in relation to life experience. The fifth assumption is that adults are not subject-centered (characteristic of young learners) as much as problem-centered. The subject-centered approach views learning through content of the discipline where problem-centered technique

integrates content and skill from a variety of disciplines. If a problem is stated, adults enjoy learning new material to solve the problem. If a set of procedures or ideas is to be studied without a connection to a real world problem, there is usually frustration for the adult learner in this learning activity.

The final assumption is that adult learners are externally motivated to learn. Although adults are usually in an informal learning mode, it generally takes a tangible external motivation to encourage an adult to return to formal education. Promotions, improved salaries, change in status, and better jobs are the primary external motivations for adult learning.

Cross (1981) advocates another approach to organizing the adult learning model. The characteristics of adults as learners (CAL) framework is made up of two sets of characteristics, personal and situational. The personal characteristics include: (a) physiological/aging, (b) sociocultural/life phases, and (c) psychological/developmental stages. The situational characteristics include part-time learning versus full-time learning and voluntary learning versus compulsory learning. This model frames the complexities of interacting personal and social forces on the adult learner. The complexity is due to the holistic attempt to understand the internal and external forces on the adult learner.

Cross (1981) acknowledges that the assumptions made by the andragogical model are usually, but not always, correct. In comparing a dependent adult and an independent child, one will realize that the andragogical model is simply a reflection of commonly observable differences between adult and child learners.

Both the andragogical and CAL model attempt to understand structurally the adult learning process. Neither is beyond the stage of hypothesizing. Experience indicates that both have merit, but the adult learning process has not been proven in a reliable, replicable manner. Andragogy is presented as a set of assumptions. A closely related field dealing with adult learning is experiential learning.

Kolb (1984) defines experiential learning as ". . . the process whereby learning is created through the transformation of experience" (p. 38). Several characteristics are listed by Kolb (1984) in relation to experiential learning. First, learning is a process rather than a product. Second, learning as a continuous process is grounded in the experience of the student. A third characteristic is that learning is a process of resolving opposing elements of knowledge (abstract versus experiential). Fourth, learning is a holistic process that involves the total being of the learner. Finally, there is a transactional relationship between the learner and the physical environment. The current state of the environment has a profound impact on the type of current learning process. If the learner eventually changes the environment, then the environment will have a different impact for the next learner.

The adult learner is a prime candidate for the action and reflective modes of learning activities. The action is the real world experience of the adult learner. The reflective mode is the integrating of concepts framed in a mentally disciplined manner with the imperfect world of experience. Brookfield (1986) states:

> This process centers on the need for educational activity to engage the learner in a continuous and alternating process of investigation and exploration, followed by action grounded in this exploration, followed by reflection on this action, followed by further investigation and exploration, followed by further action, and so on. This notion of praxis as alternating and continuous engagements by teachers and learners in exploration, action, and reflection is central to adult learning. It means that explorations of new ideas, skills, or bodies of knowledge do not take place in a vacuum but are set within the context of learners' past, current, and future experiences. (p. 15)

Bloom, Engelhart, Furst, Hill, and Krathwohl (1956) classify reflective learning as an evaluation process. A six class taxonomy of learning objectives lists the evaluation classification as the highest level of learning due to the complexities of mastering the other five classes (knowledge, comprehension, application, analysis, and synthesis) plus adding the process of value judgment utilizing the cognitive rather than the emotional process. Assessment at this level is difficult and therefore infrequently used at the undergraduate level in college.

King and Kitchener (1994) describe the reflective judgment model as a neglected facet of the critical thinking and reflective learning process. The desired outcome of the educational process is to have adult learners capable of making defensible judgments about vexing problems. It is not satisfactory to simply just bring the adult learner to the stage of critical thinking and reflective learning in the academic setting if the reflective judgment skill has not been considerably improved by the learning experience.

The reflective judgment model has three main categories: (a) pre-reflective thinking, (b) quasi-reflective thinking, and (c) reflective thinking. Pre-reflective thinking does not use evidence to reason toward a conclusion. Reasons given do not appear to be logically connected to the issue. Quasi-reflective thinking recognizes that some problems have elements of uncertainty that eliminate the possibility of reaching simple solutions. This level has trouble properly using evidence to develop a conclusion. Reflective thinking accepts that knowledge is not a given but must be constructed. While knowledge must be developed from data and evidence, it is always subject to reevaluation. The context in which data and evidence is observed can change the nature of the knowledge when reevaluated. The goal is to move the adult learner through the reflective thinking stage.

Reflective learning allows the adult learner to learn not only the content but the hows and whys related to the content (Marsick & Watkins, 1991). Action and reflection

learning as well as reflective judgment are portions of the experiential learning process that deals with moving the learner from a rote memorizer to a person who can understand and integrate knowledge with experience.

Learning Styles

There is no such thing as one best instructional method for teaching due to the variety of learning styles. Adult learners bring to the instructional experience preferences for different styles of learning (Barbe & Swassing, 1988; Dunn & Dunn, 1978; Guild & Garger, 1985; Hiemstra & Sisco, 1990; Jensen, 1987; Keefe, 1979; Keirsey & Bates, 1984; Kemp, 1971; Lawrence, 1982; McCaulley, 1976; Myers, 1980).

The Myers-Briggs Type Indicator (MBTI) is one of over thirty instruments developed since 1960 that analyze learning styles (Jensen, 1987). The Keirsey Temperament Sorter (KTS) is an abbreviated version of the MBTI (Keirsey & Bates, 1984). Both instruments use identical terms in identifying type indicators. The four dimensions of type indicators are: (a) extrovert (E) and introvert (I), (b) sensing (S) and intuitive (N), (c) thinking (T) and feeling (F), and (d) judging (J) and perception (P). The KTS identifies one type indicator for each of the four pairs of dimensions. There are 16 possible combinations of type indicators ISTJ, ISFJ, ISTP, ISFP, ESTP, ESFP, ESTJ, ESFJ, INFJ, INTJ, INFP, INTP, ENFP, ENTP, ENFJ, and ENTJ (Lawrence, 1982).

Each adult learner can be linked to one of the 16 possible type indicators. The type indicators point toward a preferred learning style. Lawrence (1984) states that the MBTI can predict: (a) preferred cognitive patterns, (b) attitudes and interests that influence an area of focus within a learning situation, (c) learning environments compatible with a particular cognitive style, and (d) learning tools most desired and those most avoided.

Differences exist in how adult learners approach learning (Jensen, 1987). For example, adult learners that are sensory (S) approach the test-taking experience differently than intuitive (N) adult learners. The sensory (S) adult learner experiences difficulty in answering theoretical or abstract questions on a test. Answers based on life experiences are used in response to questions as opposed to using inductive thinking. Sensory (S) adult learners tend to reread a question so carefully that in the end it is misread. Points are often lost on tests through the process of changing answers. Intuitive (N) adult learners are usually better test takers than sensory (S) adult learner counterparts. Hunches are trusted which generally produces higher test scores. However, trusting hunches can sometimes lead to carelessness because intuitive (N) adult learners do not always read questions carefully enough to see all the details. Test scores can usually be improved by re-checking their work before turning in a test.

If a course deals with abstract theoretical material (such as philosophy), what can an instructor do to help the sensory (S) adult learner? If a course deals with arbitrary sequential steps (such as manual bookkeeping), what can an instructor do to

help the intuitive (N) adult learner? Kemp (1971) states that these are critical questions which must be addressed when developing instructional units. The unique characteristics of individual learners must be the focus of instructional design. One solution to this problem would be to offer more than one method of evaluation for the course. Allow each adult learner to select an evaluation method best suited for their particular learning style.

The intuitive (N) adult learner might benefit by writing a paper which describes how specific bookkeeping functions fit into the overall operations of a company. The sensory (S) adult learner might benefit by working on a project that picks a current ethical issue (such as euthanasia) and attempts to view it from three or four philosophical world viewpoints. It would be especially beneficial for the sensory (S) adult learner if the ethical issue relates to a real life experience, such as a terminally ill grandparent. These assignments might either be in addition to (for extra credit) or as a substitute for a regular exam.

Learning styles do influence adult learner's ability to learn. The combination of various teaching methods and different cognitive types of subject matter creates diverse needs within a typical course. If learning styles are objectively identified and a variety of evaluation methods are offered, instructional units can be designed to enhance the learning experience for all types of adult learners.

Curriculum

The third area reviewed for this project was the curriculum literature (specifically authentic assessment). Portfolio assessment (a form of authentic assessment) allows the student an opportunity to display a variety of abilities as well as a broad scope of interest areas utilizing andragogical and experiential learning. Paulson, Paulson, and Meyer (1991) describe portfolio assessment:

> Portfolios offer a way of assessing student learning that is quite different from traditional methods. While achievement tests offer outcomes in units that can be counted and accounted, portfolio assessment offers the opportunity to observe students in a broader context: taking risks, developing creative solutions, and learning to make judgments about their own performances. (p. 63)

The portfolio process changes the way curriculum is developed. Portfolios combine two different functions. One is a measurement tool to document the learner's progress. The other is to provide a means of instruction and learning (Resnick & Resnick, 1993). Individual learning and group needs are acknowledged when portfolio assessment is allowed to be a part of the course work (Viechnicki, Barbour, Shaklee, Rohrer, & Ambrose, 1993). This process can change the way instructors teach. Applying the portfolio process to the traditional curriculum helps instructors become

more reflective about the distinct differences among students. Those individual differences receive more respect and appreciation (Lamme & Hysmith, 1991).

Instructional faculty need training for portfolio assessment to be implemented properly (Abruscato, 1993; Black, 1993; Crouch & Fontaine, 1994). There is a cognitive process involving the student moving from the working portfolio to the showcase portfolio. The student develops assessing skills to self-determine work that is presentable. More importantly, the student, through the instructor's guidance, learns to determine why a piece is presentable or not (Lamme & Hysmith, 1991). These assessing skills include ". . . making decisions, solving problems, thinking critically, separating fact from opinion, making sense of a barrage of data . . ." (Biemer, 1993, p. 81). Proper portfolio assessment training for the instructors requires more than a one day in-service meeting (Jones, 1994).

There is not a single best portfolio assessment model (Belanoff & Dickson, 1991; Black, 1993; Edgerton, Hutchings, & Quinlan, 1991; Hutchings, 1993; Paris, Calfee, Filby, Hiebert, Pearson, Valencia, & Wolf, 1992; Tierney, Carter, & Desai, 1991). Even though there is a lack of a single best model, there is a spirit of the portfolio assessment process that must be understood by the instructor as well as the student. Tierney, Carter, and Desai (1991) relay five tenets of the portfolio assessment process. First, students need to be encouraged to see a relationship between instructional activities and the lifelong educational process. Second, students need a sense of ownership of the direction of their learning. Third, reading and writing skills are essential building blocks for developing an educated individual. Instructional activities need to be designed to allow full use of these skills. Fourth, diversity (interests, backgrounds, and skills) not only exists among students, it is also desirable and should be encouraged by various types of learning activities. Fifth, respect between instructors and students must be a mutual concern. Creativity is difficult to encourage without mutual respect. The lack of a single best model is one of the strengths of the portfolio assessment process. It embodies many of the best teaching elements while being adaptable to a variety of programs and courses (Crouch & Fontaine, 1994).

Portfolio or portfolio assessment is a collection of artifacts resulting from learning activities or skill development generated and selected by the student for inclusion. The artifacts can be in the following formats: (a) written, (b) graphic, (c) audio or video medium, and (d) actual three dimensional project or some representation of it (Black, 1993; Lamme & Hysmith, 1991).

The portfolio process moves from a pack rat stage to a refined showcase stage. The first stage is called the working portfolio stage. This stage should continue even beyond the formal educational process. The refined stage is called the showcase portfolio. This stage also remains an ongoing process.

Specifically, the working portfolio is the complete collection of outcomes from the student's learning activities and development of skills. This portfolio includes work in

progress as well as outcomes that have been assessed by the student as substandard (Lamme & Hysmith, 1991). This allows the student to take a second look at one's work and see how to improve future attempts (Sweet, 1993). The working portfolio allows the learner time to gain personal control of the learning process (Jones, 1994; Wagner, Agnew, & Brock, 1993).

The showcase portfolio is a collection of the best work as assessed by the student (in consultation with the instructor). This is the portfolio that is presented to the general public (such as a student's current or prospective employer) to illustrate quality learning representing the student's abilities and scope (Lamme & Hysmith, 1991).

The portfolio assessment process is more important than the showcase portfolio. The activity of self-assessment and selection is an important cognitive activity and allows the student to integrate experience and theory (Hutchings, 1993). The portfolio logs the development of the student over a period of time ". . . in terms of growth or change in knowledge, skill, and values" (Rogers, 1991, p. 184). The actual portfolio assessment process contributes to the growth of the students as they become the owner of their own learning process (Hetterscheidt, Pott, Russell, & Tchang, 1992). Students have opportunities to reflect on the learning process and to see cognitive growth over a period of time (Valencia, Hiebert, & Afflerbach, 1994).

Tierney, Carter, and Desai (1991) have researched the portfolio assessment process in over 50 instructional settings. The results were encouraging and summarized into 10 points.

First, a wide range of students (from kindergarten to college) were empowered as learners through this process. There was an excitement attached to this learning process.

Second, student ownership of the learning process was real. Students were more aware of their progress across time.

Third, the nature of assessment changes. Instead of a competitiveness between students, the portfolio assessment process encouraged collaboration.

Fourth, external stakeholders were involved in reviewing the progress made by students. This process focuses on parental involvement, but the same concept could be applied to employer involvement. The external stakeholders were able to see achievement over a period of time through this process.

Fifth, interests that are generally outside formal education can be integrated into the portfolio assessment process. Hobbies and other leisure time interest contribute to the educational and skill development of the student.

Sixth, instructors benefit from this process. A clearer view of the whole student is made possible by reviewing the portfolio.

Seventh, there is a holistic assessment of the individual student. The instructor is more fully informed of what the student has achieved.

Eighth, the working portfolio (as well as the showcase portfolio) develops into a chronicle of the student's learning process. This becomes a very detailed method for recording learning activities.

Ninth, the portfolio is a medium for two important areas of instruction. The learning activities can be student centered in one of two ways. First, the student may need help in developing a weak academic or skill area. Secondly, the student learns to self-assess. This skill is very important and yet difficult to develop in the formal educational setting.

Tenth, the portfolio becomes an assessment of the instructor. Both the instructor and the administration are able to review the types of learning activities as well as the results related to the learning objectives prescribed for each course.

Abruscato (1993) asserts that the results from the Vermont portfolio project indicate that the portfolio assessment process is worth pursuing and that instructors need additional orientation and support related to this area. The portfolio assessment process helps the students, instructors, and administrators to identify weaknesses in the current curriculum. The problem-solving element of portfolio assessment indicates that students generally have a limited repertoire of strategies for solving problems. The traditional curriculum is right answer driven and few students pause to ponder the implications of the problem just solved (even if the correct response was given). The instructors designated to use the portfolio assessment process need an improved orientation on how to use the portfolio assessment process properly. There is a temptation for instructors to implement the portfolio assessment process as an additional activity that fits into a highly prescribed structured curriculum. The spirit of the process needs to be properly communicated to both the instructor and the student.

Portfolios cause a tension between validity and reliability in assessment measurements. Validity is best illustrated by the portfolio assessment process because it gives the best picture of what type of learning is actually taking place. It allows for the evaluation of reflective thinking in relation to the course content. The department responsible for curriculum development can more accurately assess the understanding of the subject matter.

The reliability of the assessment is not nearly as good as more traditional forms of assessment. The evaluation of outcomes can vary widely depending upon the various combinations of instructors and students. In the more traditional methods of assessment, such as a multiple-choice test, the reliability of the outcomes can be

statistically compared with various groups at various institutions. The portfolio assessment process will never be that reliable.

Dutt and Kayler (1993) found in an evaluation study that reliability was a problem in the use of the portfolio assessment process at Syracuse University's School of Education. Portfolios were used as a means for the cooperating teachers and university supervisors to evaluate the student teaching experience for education majors. While the study concluded that the portfolio assessment process was beneficial in helping student teachers to reflect upon their student teaching experience and to synthesize what they had accomplished, there was a lack of consistency in the method of evaluating the student teaching experience.

The Liberal Studies Assessment Portfolio Program at San Diego State University has found similar results for upper division education majors. "The students who have completed portfolios demonstrated that they can synthesize what they have learned and apply it to new situations. Even though they found the process time consuming and demanding, they are proud of their accomplishments" (Roeder, 1993, p. 5).

A study in authentic assessment was conducted in Hawaii using students in the Kamehameha Elementary Education Program (KEEP). Using similar elements found in the portfolio assessment process, the goal was to improve the literacy levels among Hawaiian students. The reliability issue was addressed by the researchers. The conclusion was that the benefits realized from the process of self-assessing one's own literacy outweighed any low test-retest reliability problems. Low reliability is desirable in this scenario (Paris, Calfee, Filby, Hiebert, Pearson, Valencia, & Wolf, 1992).

If the goal of assessment is to see how adult learners are actually understanding the subject matter, then reliability can be sacrificed. Elbow (1991) states that ... "the trade-off between getting good pictures of what we are trying to test and good agreement among interpreters of those pictures--it makes most sense to put our chips on validity and allow reliability to suffer" (p. xiii).

In a study conducted at Ball State University, Green and Smyser (1993) found that the portfolio assessment process allowed students to take charge of their professional development. This process influences positive changes concerning evaluation of professional growth and reflective thinking. "Organizing the evidence which documents one's strengths and weaknesses . . . seems to enable students to value planning for professional growth. And, maintaining professional dialogue with peers and mentors apparently creates a more collegial approach to professional development" (Green & Smyser, 1993, p. 17).

One problematic characteristic of the portfolio assessment process is time. To implement the process properly, the instructor is required to review the showcase portfolio and see how it compares to the working portfolio. This makes large scale implementation of the portfolio assessment process difficult (Jones, 1994; Stecher &

Hamilton, 1994). The institutions implementing portfolio assessment processes need to consider the time burden as a built-in characteristic.

Even though the portfolio assessment process is time consuming, it can be a valuable experience for the learner. Many institutions of higher education are using various forms of the portfolio assessment process in programs designed for traditional and nontraditional learners. Courts and McInerney (1993) have developed a plan for implementing the portfolio assessment process in an institution of higher education.

First, create a standing committee in the academic department to articulate the specific goals of the program (or major). Even though this sounds like a redundant exercise, it is surprising how many departments lack clarity in goal definition.

Second, identify faculty members who are interested in implementing the portfolio process in their courses. Do not require reluctant faculty members to adopt this process.

Third, involve other professionals who are not members of your academic division. This might include the writing laboratory director as well as a faculty member from an academic division providing support courses to the major.

Fourth, do not begin with the goal of assessing everything in the major. Identify a few specific goals that are important in the professional development of the major. These are "big-picture" type goals.

Fifth, communicate on a regular basis via divisional meetings to keep everyone informed on the implementation of the process. Repeated explanations of the purpose of the portfolio assessment process may be required. Do not assume that everyone will comprehend the totality of the process in one meeting. Allow questions and issues to be asked and discussed in divisional meetings.

Sixth, plan for evaluation of the portfolio assessment process as it relates to helping learners fulfill the goals of the major. This may be an enlightening experience for faculty. The evaluation process may show a lack of comprehension even among learners with high grades. Use this experience as a way to improve the curriculum.

Portfolio assessment is a method and process through which andragogical and experiential learning can enhance the adult learning experience. It allows the adult learner to have more control over the outcomes of various learning activities.

Leadership and Management

When implementing a new concept into the academic world, indifference toward that concept can be fatal. It is important to understand how to properly lead faculty toward the acceptance of a new concept.

Haugerud, Little, and Parks (1993) describe the leadership development action plan (LDAP) model. This model has five components: (a) challenging the process, (b) inspiring a shared vision, (c) enabling others to act, (d) modeling the way, and (e) encouraging the heart. The LDAP is a model that synthesizes leadership development and participatory management.

Leadership is defined as ". . . a process that helps direct and mobilize people and/or their ideas" (Kotter, 1990, p. 3). An example of mobilization of followers toward a vision is Bill Gates (president and chief executive officer) as leader at Microsoft (a software development corporation). Deutschman (1992) states that Gates' compelling vision is the driving force at Microsoft. Gate's vision is to transform how people obtain information. This vision gives direction to the organization. The day to day operations at Microsoft plus its new product developments mobilize its employees to move toward that vision. It would have been easy for Gates to settle for the early success of MS DOS and to revert into a management only mode. The growth of Microsoft is following the direction that Gates' vision is pointing toward. This is a good illustration of the subtle difference between leadership and management.

Management is involved in planning and budgeting, organizing and staffing, and controlling and problem solving. The purpose of management is to give consistency and order to an organization. Leadership produces movement by three important subprocesses: (a) establishing direction, (b) aligning people, and (c) motivating and inspiring (Kotter, 1990). The purpose of leadership is to produce change. The three subprocesses of leadership were the focus of this study.

Establishing Direction

"Leadership produces change" (Kotter, 1990, p. 35). Direction setting as opposed to the development of detailed plans is the desired outcome of leadership. Direction setting is translated into strategy development. Strategies possess a level of uncertainty. Management gives consistency and order to an organization. Strategies give direction rather than order.

The process of producing change is not the same as developing a long-range plan. The process of producing change focuses on direction setting. Kemerer, Baldridge, and Green (1982) argue that true strategy development does not follow traditional long-range planning formulas. The first step is to establish direction (vision or goals). After the direction has been established, the process of reaching the vision or goal must be loose enough to adjust to external and internal environmental changes.

Direction setting involves the rational process of gathering information (Kotter, 1990). Bean (1990) challenges that the institution needs to always be scanning the external environment to find information about external threats and opportunities. The process of strategy development uses the gathered information to give direction to the

organization in response to external threats or opportunities. Direction setting does not involve developing a detailed master plan that specifically states what will be done over the next five years. Changes in the external environment seldom allow for that level of certainty about the future (Bean, 1990; Kemerer, Baldridge, & Green, 1982).

Aligning People

Aligning followers toward a new direction is successful only when there is effective communication (Bennis & Nanus, 1985; Kotter, 1990). Communication is a two way process. Based upon the information gathered concerning the external environment (as well as the condition of the internal environment), the direction may be developed by the leader or both the leader and followers (coworkers). Either process requires a great deal of communication between leader and followers as well as among followers.

Followers need to see on a regular basis that the leader really believes in the direction that has been set. Leaders must lead by example. ". . . behavior creates attitudes, not the reverse" (McCall, 1989, p. 117). Kotter (1990) states that actions speak louder than words, known as "'walking the talk'" (p. 57). Followers model the actions of the leader (Nielsen, 1993). Kouzes and Posner (1993) state that followers need leaders who will ". . . do what we say we will do -- DWWSWWD" (p.47). This produces the credibility level that a leader has with the followers (Kotter, 1990; Kouzes & Posner, 1993).

Bensimon, Neumann, and Birnbaum (1989) list six categories of leadership theories: (a) trait, (b) power and influence, (c) behavioral, (d) contingency, (e) cultural and symbolic, and (f) cognitive. The contingency category is made up of theories that allow for leadership style to be influenced by both the external environment and the nature of the task at hand. Decision participation is one model listed under the contingency category. The level of decision making involvement of the followers varies based upon the task at hand. The leader needs to select the correct level of decision making involvement. Communication is an important key for all levels of decision making involvement, but the level of participation in the final decision may vary.

Participatory decision making management is one example listed under the decision participation model (Vroom & Jago, 1988). Participatory decision making management involves performing an analysis to determine the best decision making method to be used in a given situation. Autocratic, consultative, and group are the three methods of decision making. These methods blend various levels of information gathering and participation.

The autocratic method allows the leader to make the decision without direct participation from the followers. With the consultative method, followers are asked to provide input regarding a situation. The leader ultimately makes the decision which may or may not be in agreement with the consensus of the followers. The group

method allows the followers to make the decision (which may or may not agree with the leader's viewpoint). Under this method the group decision is implemented. The goal is to select a method that produces the most effective decision for the organization. An effective decision is determined by: (a) time constraints, (b) responsiveness to customer service issues, (c) allocation of scarce resources, and (d) interest level of employees in the problem at hand.

Vroom and Jago (1988) do not separate leadership from management in their presentation of participatory management. In order to bring about good decisions, a culture must be developed within an organization that allows freedom to choose the best decision making method. In addition, individuals must be trained and developed to lead or manage that process.

If time allows, the group and consultative decision making methods are best for aligning followers. With the consultative method followers may not agree with the final decision, but are asked to give information that will help in making a decision. Followers have had an opportunity to share information they felt was important and in that way have some ownership of the decision.

Vroom and Jago (1988) and Kotter (1990) agree that a culture needs to exist within an organization that allows individuals to develop as participatory decision makers. The skill of making effective decisions can be learned. Using case studies as part of the training, individuals recommend the best decision making methods for various situations. The goal is to help managers and leaders use participatory decision making techniques as often as possible realizing, however, that no one method is best for every situation.

Participatory decision making goes beyond the holding of group meetings. The specific purpose of each meeting must be clearly communicated to the followers (preferably prior to the meeting). In addition, the followers must view the purpose of the meetings as valuable enough to spend their time in participation (Haugerud, 1992, 1993a).

Motivating and Inspiring

Leaders must inspire and motivate followers to pass through obstacles and roadblocks that invariably lie in the path of change. "Motivation over time requires first, that visions and strategies be communicated on a continuous basis, not just once or occasionally" (Kotter, 1990, p. 72).

Gardner (1989) advises leaders to unlock and redirect existing motives in followers. Creating motivation out of thin air is difficult. It is easier to find and align existing motivations in followers that relate to the vision. Empowering followers to act upon existing motivations allows followers to become leaders in their own (although sometimes limited) domains (Cronin, 1989). Followers who are empowered to make a

difference in the organization will: (a) feel more responsible for the outcomes of the organization, (b) show more initiative in helping the organization reach its goals, and (c) have greater enjoyment with their participation in the origination (Wellins, Byham, & Wilson, 1991).

Motivation and inspiration passed on from leader to followers are built upon the (a) level of readiness for change among followers (Haugerud, 1993c) and (b) networking and strength of relationships between leader and followers (Haugerud, 1993b; Kouzes & Posner, 1993). Followers must be ready for change. The level of preparation through participatory decision making management and effectiveness of communicating the vision can determine the level of readiness among followers for change. Relational networks enhance communication. Kotter (1990) uses the term thick informal networks. This type of network often does not follow traditional organizational charts. It allows the leader to communicate with any stakeholder who could help or hinder the implementation of the vision. Effective communication creates cooperation among stakeholders toward reaching the vision. This process can alleviate some of the competitiveness among administrative units that is a usual byproduct of the organizational chart design.

Strategic Planning

Strategic planning is a system that combines leadership and management concepts. Leadership combined with participatory management techniques is required for strategic planning to be properly implemented in an organization.

Strategic planning is aimed at designing a good fit between the processes and outputs of an organization and the societal factors of the external environments in which the organization operates. Societal factors are ever changing therefore their influence upon an organization cannot be minimized. External environments are the focus of the organization. The organization's desire is to do the right thing in response to the ever changing demands found within the external environments as opposed to focusing on doing things right (such as policies, programs, and procedures based upon old demands). The organization views its activities in terms of effectiveness rather than efficiency. The ability to make changes quickly through wise and informed decision making is perceived as a goal much more worthy than producing a grand detailed multi-year master plan (Baldridge & Okimi, 1982). Strategic planning is a state of mind rather than a plan (Kemerer, Baldridge, & Green, 1982). Strategic planning must involve the executive officers of the organization (but ought to include many others). Inclusion of all levels of employees into the planning process reduces potential resistance to future change (Ullrich, 1976). When preparing a response to changing societal factors, the organization must be viewed as a whole (Cope, 1981).

Kemerer, Baldridge, and Green (1982) discuss some of the differences between strategic planning and conventional planning. Strategic planning is conducted by top-level officials while conventional planning is often conducted by a designated planning

office. While the planning office may demonstrate more efficiency in the building of a master plan, top-level officials do not own the plan and therefore implementation can be difficult.

Strategic planning has a medium to short range time orientation as compared with the long range time orientation of conventional planning. If the plan remains rigid for five to seven years and the intention is to stay with the plan, changing societal factors of the external environments may be ignored.

Conventional planning tends to focus on the internal environment and organizational needs. Strategic planning scans societal factors first, then reviews the internal environment to ascertain whether changes should be made to meet changing demands. Strategic planning results in critical decisions being made in an attempt to respond to changing societal influences. The product of conventional planning is a master plan or blueprint. Keller (1983) states that strategic planning, unlike conventional planning, is not a bundle of departmental plans compiled and edited into a master plan (a popular exercise in the 1960's). This bottom-up concept attempts to satisfy internal desires and the hopes of several independent departments. Strategic planning takes a holistic approach placing a higher priority on the demands of the external environments over the desires of the internal environment.

Bryson (1988) states that several things have to take place in order for strategic planning to be successfully implemented. First, the administrative cabinet and the president of the institution have to be in agreement over the need for strategic planning and agree to actively participate in the implementation of it. A strategic planning expert (external or internal) should be designated to keep the organization focused on this different style of planning.

Mandates for the institution need to be identified. Institutions are restricted by governmental regulations as well as cultural mores. For example, there are limits to the creativity an organization can use in reorganizing federal financial aid packages. The social mores of the institution and its stakeholders also need to be considered. For example, eliminating required chapel attendance for the traditional residential college student may not be an option for a conservative Christian college.

The mission statement and values of the institution need to be clarified. What is the institutional mission? What values does the mission statement imply? Julliard School does not opt to become a sports management school producing football coaches just because the national trend shifts away from the performing arts (music, drama, and dancing) (Keller, 1983).

Assessing the external environments for opportunities and threats provides the cornerstone for the strategic planning concept. Quantitative and qualitative data should be reviewed to assess current opportunities and threats to the institution posed by external environments (Goodstein, Nolan, & Pfeiffer, 1993). The design of the strategic

planning process is critical to its success, especially with regard to the proper input device (Camillus, 1986). This study can be conducted by using the input device known as the Institutional Societal Factors Inventory (ISFI) process (Varcoe, 1993). Strategic planning is almost useless if this step is not thoroughly implemented. This is the only way to delineate current opportunities and threats.

Assessing the internal environment for strengths and weaknesses is also necessary. A quantitative and qualitative study must be conducted to gain an accurate picture of the strengths and weaknesses found within the institution.

The next step is a summation of the previous five steps. The institution identifies the strategic issues (societal and internal factors) that it is currently facing. Are there new opportunities that ought to be addressed? Are some of the previous opportunities disappearing? What about threats such as new competition, a negative change in the local economy, or the loss of state financial aid for private institutions? What about changes in the strengths and weaknesses of the institution? How will these changes be affected by changes within the external environments?

The next step includes the formulation of strategies for managing the issues. A general plan needs to be outlined in order to give the institution direction, however it must be brief and flexible. The plan is to give direction, but not lay out policies and make seven year projections. The institution must be able to make quick changes as the demands of the external environments change. A strategic issue might involve improving dorm life for residential students because a major competitor has upgraded freshman dorms to include such things as air conditioning, microwave ovens, and computers. This issue needs immediate attention. It cannot become part of a five year plan with an appointed committee debating whether students really need such an upgrade. If a competitor is identified as a major threat, then the institution cannot afford to wait five years to respond.

In the final step strategic planners develop a vision for what the institution should look like based on the previous steps. They must hold this vision in their minds as they implement changes in the organization (including both tangible and intangible areas). They must keep this vision in mind when the art department (who has a declining enrollment and the study of the external environments indicates a declining interest in art as a major) absolutely needs a new state of the art computer driven kiln. The art department may think it is crazy to put microwaves in freshman dormitories when there are academic needs that are yet unfulfilled. The conventional planning method would give the art department the new kiln and wait five years to upgrade the freshman dormitories.

Blending ISFI with strategic planning makes a good combination for working within an educational institution. It helps the institution focus on some important flaws found in conventional planning (Baldridge & Okimi, 1982). The example of the dormitories versus the art department is a good illustration of a major flaw in the

conventional planning method. The needs of academic departments would not have been weighted against external threats. That would not have been a logical pattern of planning using the conventional planning method.

Successful strategic planning depends on personnel who understand both the ISFI process and how it relates to strategic planning. A change of presidents or top level officials could jeopardize the strategic planning process over a period of time. It would be easy to slip into the conventional planning mode because it is so concrete and a ten year master plan can be developed into a multi-hundred page document. This can be a form of accomplishment for some administrators who like to see tangible evidence of long range plans. A flexible 25 page strategic planning document may not look as impressive to the board of trustees or to outside governmental agencies.

The use of the ISFI process along with the implementation of strategic planning allows educational institutions to make internal corrections promptly. The external societal factors strongly influence the future of an institution. Strategic planning allows the institution to respond positively to external forces.

Summary

This review of the literature indicates that portfolio assessment is one method that allows individuals to develop across a broad scope of areas and then to illustrate various competencies to current and prospective employers. This method allows enough flexibility that the formal postsecondary curriculum can be customized to individual interest without losing the discipline of content coverage. This may be the best solution for dealing with the ever changing demands of the work force during the next few decades.

The leadership and management literature illustrates important components for implementing change in an organization: (a) establishing direction,(b) aligning people, (c) motivating and inspiring, and (d) strategic planning. The successful implementation of the portfolio assessment process into the BBA program requires careful attention to these components.

Chapter 3

ELEMENTS TO INCLUDE IN THE PORTFOLIO ASSESSMENT PROCESS

There are a variety of ways to develop a portfolio assessment process within a curriculum. The literature review indicates that there is not a single best portfolio assessment model (Belanoff & Dickson, 1991; Black, 1993; Edgerton, Hutchings, & Quinlan, 1991; Hutchings, 1993; Paris, Calfee, Filby, Hiebert, Pearson, Valencia, & Wolf, 1992; Tierney, Carter, & Desai, 1991).

To identify elements for inclusion in the portfolio assessment process in the BBA program, two areas were reviewed. First, the literature was reviewed in the following areas: (a) human resource development (current and future work force needs), (b) adult learning, (c) learning styles, (d) curriculum (portfolio assessment), and (e) leadership and management (leadership, decision-making, participatory management, and strategic planning). Primary sources for the literature review included: (a) Educational Resources Information Center (ERIC) documents, (b) appropriate professional journals, and (c) required and suggested readings from the syllabi of seminars in the higher education program at Nova Southeastern University.

Table 1
Selected Institutions Using the Portfolio Assessment Process

Institution	Contact Person
Alverno University	S. Barkow
Baldwin Wallace	A. Swanson
Bethany College	D. Landon
College of Saint Rose	A. Sheehan
Georgia State University	J. Jones
Hiram College	A. Konick
Miami University	L. Beck
Mid-America Nazarene College	D. Croy
University of Northern Colorado	L. Jackson
University of South Dakota	L. Danielson

Second, 10 institutions of higher education using the portfolio assessment process were identified from a variety of sources (see Table 1) for review. The 10 institutions were asked to submit responses to five items: (a) purpose of the portfolio assessment process, (b) how individualized learning is developed through this process, (c) manner in which learning is accomplished, (d) methods for illustrating fulfillment of educational needs and development of skills, and (e) training program for instructors.

The following portfolio assessment process elements were identified from the review of the literature and the 10 institutions: (a) purpose, (b) analysis of personal competencies and achievements, (c) analysis of current and future work force needs, (d) development of individual learning outcomes, (e) plan to achieve individual learning outcomes, (f) analysis of attainment of individual learning outcomes, (g) artifacts to include in the portfolio, (h) working portfolio, (i) showcase portfolio, (j) evaluation methods, (k) portfolio advisor, and (l) training. These elements relate to the specific portfolio assessment process considered for implementation at MVNC.

Purpose

The portfolio assessment process in the BBA program must have a well-defined purpose understood by the curriculum writer and facilitating instructor. The purpose must be clearly communicated to the adult learner and the audience reviewing the final portfolio product.

The purpose of the portfolio assessment process includes the following:

1. to provide a vehicle for self-assessment and purposeful reflection,
2. to help the adult learner identify current and future work force educational and skill needs and use individualized learning experiences within the BBA program to meet one or more of those needs, and
3. to document professional self-presentations of the individualized learning experiences within the framework of the BBA program in ways other than a final grade listed on an academic transcript.

Analysis of Personal Competencies and Achievements

The adult learner is to gather and organize materials to develop a narration describing current competencies and past achievements (autobiographical). This narration should also include goals in the personal and career realms.

Analysis of Current and Future Work Force Needs

The adult learner analyzes current and future work force needs related to either current employment or a desired area of employment. The analysis is documented in the post BBA career goal proposal and report. The analysis is conducted using the development methodology of scientific inquiry. This methodology seeks a solution to a problem involving some type of product development. Development methodology applies the discipline of scientific inquiry to a research question without the use of a hypothesis or statistical analysis (Robinson & Lorion, 1994).

The current and future work force needs pertaining to an adult learner's career development is the problem for this analysis to solve. A solution to this problem is sought by designing research questions answered by the scientific inquiry of development methodology. The development of this analysis involves a review of related literature and interviews with properly selected experts. The scientific inquiry provides a disciplined approach toward using critical thinking skills to solve the adult learner's problem by analyzing the needs of the current and future work force.

Development of Individual Learning Outcomes

The adult learner will combine the analysis of personal competencies and achievements with the analysis of current and future work force needs in developing a set of individual learning outcomes suitable within the guidelines of the BBA curriculum. The outcomes must allow for flexibility yet provide focused direction. The portfolio advisor will guide the development of these learning outcomes.

Plan to Achieve Individual Learning Outcomes

The adult learner will develop a plan to achieve individual learning outcomes. The BBA curriculum will be the framework in which the individual learning outcomes will be achieved. A plan outlining the relationship of individual learning outcomes and the prescribed BBA courses will be developed by the adult learner with the guidance of the portfolio advisor. This plan will help the adult learner and the portfolio advisor to assess the quality of the individual learning outcomes.

Analysis of Attainment of Individual Learning Outcomes

The adult learner will provide a summary for each artifact describing how a specific individual learning outcome was achieved. It may take several artifacts to achieve a specific individual learning outcome and an artifact may contribute to more than one individual learning outcome. The adult learner is responsible for this part of the analysis to contribute toward ownership of the portfolio assessment process.

The portfolio advisor will evaluate the adult learner's analysis of the attainment of individual learning outcomes. A portfolio is not acceptable as a showcase portfolio until all individual learning outcomes have been achieved and presented via the artifacts in the highest quality format. The showcase portfolio is to be a product worthy of both the adult learner and MVNC. The portfolio assessment process is one of completeness rather than a means to earn a letter grade on an academic transcript.

Artifacts to Include in the Portfolio

The showcase portfolio is the final product. Most institutions require a binder to hold the artifacts within the showcase portfolio. Certain artifacts are referenced within the binder, but are placed in a separate container. Video tapes, audio tapes, computer

disk, and large presentation materials are examples of these types of artifacts for the showcase portfolio.

The following artifacts are included in the working and showcase portfolios.

- Resume
- Current college transcripts
- Copies of professional certifications, licenses, etc.
- Other documentation of achievements (such as newspaper clippings)
- Narration (Autobiographical)
- Analysis of current and future work force needs related to current or future employment
- Individualized learning outcomes for the BBA program with a listing of artifacts demonstrating achievement
- Projects
- Research papers
- Presentations
- Products
- Reflective writing linking artifacts to individualized learning outcomes
- Team projects
- Video of presentations the adult learner has made demonstrating ability to design, deliver, and evaluate presentations in a variety of settings

While artifacts cover a wide range of area, items such as class handouts or reproduced articles of interest do not qualify. Each artifact included in the showcase portfolio must represent work which the adult learner has directly produced.

Working Portfolio

The working portfolio is the development or "pack rat" stage of the portfolio assessment process. While worthless items should not be included, any item of possible value should be collected. This includes projects and papers that need further revision. One activity of the portfolio assessment process is to encourage the adult learner to revise all projects and papers at least one more time beyond the final grade given by the facilitating instructor within the BBA program.

Showcase Portfolio

The showcase portfolio is a collection of the best work as assessed by the adult learner. Each project, paper, and presentation will be preceded by a reflection paper linking it with one or more individual learning outcomes. The showcase portfolio will

illustrate the abilities and scope of the adult learner in fulfilling current and future work place needs within the selected career area.

Evaluation Methods

The primary purpose of the portfolio assessment process in the BBA program is to assess learning beyond the limitation of a final grade listed on an academic transcript. This poses a problem in how to provide evaluation that holds the adult learner, facilitating instructor, and the institution accountable for insuring that quality learning has led to the proper awarding of earned credit as related to the portfolio process.

The portfolio advisor has two choices for the final evaluation of the showcase portfolio: acceptable and unacceptable. An unacceptable evaluation will require the adult learner to revise the showcase portfolio until it is acceptable. The criteria for an acceptable showcase portfolio include: (a) attainment of all learning outcomes, (b) professional appearance of showcase portfolio physical design (binder, tabs, document quality, etc.), (c) proper selection of artifacts, (d) publication quality of all written artifacts (proper grammar and spelling), and (e) professional oral presentation of showcase portfolio related to the adult learner's personal analysis of current and future work force needs.

When properly implemented, the adult learner carries the burden to demonstrate improvement. This process not only indicates revisions as acceptable, but also an appropriate part of developing credible final products. When the adult learner understands this concept, there is a freedom to seek improvement through active self-criticism.

Portfolio Advisor

Each adult learner involved in the portfolio assessment process will be assigned a portfolio advisor. Facilitation, guidance, and accountability are the portfolio advisor's responsibilities to the adult learner. This is an important element in the portfolio assessment process because advisors will provide motivation and assistance.

Training

Faculty training was identified as a weakness at the 10 institutions listed in Table 1. Some institutions have had some success with informal mentoring and collaborative training. Formal training providing a vision of the portfolio assessment process to teaching faculty and advisors has been minimal. It is interesting to note that much of the literature review highlights the importance of training and that the portfolio assessment process cannot achieve full potential without it.

In EXCELL all curriculum writers, facilitating instructors, and portfolio advisors will receive training in the portfolio assessment process. These three groups need training to understand how each role influences and is influenced by the portfolio assessment process. The portfolio advisors will oversee the working and showcase portfolio process, but the curriculum writers and facilitating instructors need to understand the concept of the portfolio assessment process. The curriculum writers will need to provide opportunities within each course to contribute artifacts to the working portfolio. The facilitating instructors need to assist the adult learner in fulfilling specific course learning objectives and individual learning outcomes through the proper development of artifacts.

An orientation session reviewing chapters 1, 2, and 3 of this document will provide an opportunity for the curriculum writers, facilitating instructors, and portfolio advisors to understand the concept of the portfolio assessment process. Regular follow up training sessions will provide opportunities for these groups to share implementation procedures with each other. The initial training will provide ownership opportunities for the three groups. A training strategy (designed around culture and visions sharing) will be developed for personnel hired after the initial implementation process.

Summary

Since there is not a single best model for developing a portfolio assessment process, the elements reviewed in this chapter will be suggestions to be considered by EXCELL. EXCELL faculty will need to use professional judgment as to the proper implementation of the portfolio assessment process into the BBA program.

Chapter 4

IMPLEMENTATION

Strategic planning attempts to design a good fit between the processes and outputs of an organization and the external environments in which the organization operates. The ability to make changes quickly through wise and informed decision making is a worthy goal (Baldridge & Okimi, 1982). The introduction of a new concept requires leadership strategy that focuses on the proper way to introduce change into an organization.

There are three major leadership components to consider when implementing a new concept: (a) establishing direction, (b) aligning people, and (c) motivating and inspiring. Change is difficult when these components are not properly established. All three components are part of this plan to implement the portfolio assessment process into the BBA program.

Establishing Direction

The external environment has changing educational and skill developmental needs for the current and future work force. Each adult learner enrolls in the BBA program with a unique variation of those needs. A flexible BBA program (internal environment) is able to respond to the changing external environmental needs for each adult learner while maintaining academic integrity. Strategic planning requires regular scanning of the external environment for opportunities and threats while regularly evaluating how the BBA program can be adjusted to respond positively to those needs.

The process of producing change is not the same as developing a long-range plan. The process of producing change focuses on direction setting. Vision is a form of direction setting. The executive director of EXCELL will present the vision of this new concept of implementing the portfolio assessment process into the BBA program to the EXCELL faculty. This group of faculty is responsible for overseeing the BBA program and therefore must have ownership of this vision. The faculty need to understand that implementing the portfolio assessment process is in response to meeting the needs of the external environment.

Direction setting involves the rational process of gathering information (Kotter, 1990). Direction setting is a response to information gathered about the external and internal environments. The executive director has completed preliminary research as outlined in Chapter 3 of this document. In response to this research a direction has been established by the executive director. It is proper to establish direction (vision), but once the direction has been set it must be loose enough to adjust to external and internal environmental changes. The flexible design of the implementation plan allows for alterations and improvements as desired by the faculty. EXCELL faculty will probably suggest several alterations to the elements listed in Chapter 3. These

changes become the mark of ownership for the EXCELL faculty as they share the vision with non-EXCELL faculty.

Aligning People

Indifference can be fatal to a new concept. Key stakeholders need to actively support the vision for that new concept. Aligning people does not mean that a group of followers line up single file and are ready to be pushed. Instead, aligning means to inspire a sense of vision and shared ownership through which the group develops a sense of inner motivation to adopt and implement a new concept.

For this concept to be adopted at MVNC, it may require support outside of EXCELL. As the EXCELL faculty work with this concept, a decision (through collaborative effort) may be made to add a course or change the existing course structure in the BBA program. This type of action will involve key stakeholders (academic council, EXCELL budget and program development committee, and the MVNC faculty). This is where the sense of ownership and shared vision of the EXCELL faculty will be important and will need to be clearly communicated.

Motivating and Inspiring

As the EXCELL faculty work on implementing a portfolio assessment process into the BBA program, it is important to encourage, inspire, and empower. Encouragement is a powerful tool for inspiring coworkers to become involved and feel a sense of ownership of the vision. The executive director needs to look for opportunities to inspire the EXCELL faculty by giving praise to ideas and accomplishments related to the implementation of this concept. Recognizing individual contributions is one way to empower people.

Inspiration is an excellent way to motivate. To encourage the EXCELL faculty to give the portfolio assessment process a high priority, they must be motivated. Gardner (1989) states that a leader needs to unlock and redirect existing motives in coworkers. It is difficult to create motivation out of thin air. It is easier to find existing motivation and align it toward a vision. The following ideas might motivate EXCELL faculty to include the portfolio assessment process in the BBA program.

- Provide more direct real work applications
- Adult learners need career guidance
- Employers need to see the relationship between the outcomes of the BBA program and the adult learner's job responsibilities
- Adult learners need additional help in developing critical thinking skills
- To instill the habit of revising beyond the final grade

- To allow the BBA program to serve central Ohio by assisting adult learners to be prepared for future work force needs
- To help adult learners see connections between the various disciplines covered within the BBA program

Summary

Establishing directions, aligning people, and motivating and inspiring are leadership components built into this implementation plan. Change in the academic environment requires collaborative support from various groups of stakeholders. An autocratic approach to implementation could lead to indifference and a lack of ownership, hence failure. Vision, ownership, and connections to existing motivations provide an improved chance for a successful implementation.

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Appendix L

Portfolio Training for Portfolio Advisors and BBA Facilitating Instructors

The portfolio training program for developing portfolio advisors and facilitating instructors to teach in the BBA program is a nine step program. The first eight steps are completed prior to the training session. Step nine is completed during the training session. Materials for the all nine steps are included in a training manual.

STEP ONE

The first step, *Adult Learning and Curriculum,* is a brief review of the adult learning and curriculum literature. The curriculum literature review focuses on the portfolio assessment process.

STEP TWO

Completing a post BBA career goal worksheet is the second step. The BBA business research course requires each adult learner in the BBA program to complete a worksheet related to the post BBA career goal. The worksheet begins the process of developing individual learning outcomes that will be attained in the portfolio assessment process. Portfolio advisors and facilitating instructors will experience this part of the process in the second assignment.

STEP THREE

The third step, *The Portfolio Assessment Process in the BBA Program,* is an introductory article giving an overview of the portfolio assessment process as used in the BBA program. The purpose and components of the portfolio assessment process are described.

STEP FOUR

The article, *Individual Learning Outcomes,* describing the future work force is step four. This includes a description of essential skills employers want and the forces that will reshape work in the future.

STEP FIVE

The individual learning outcomes, used to evaluate the success of the portfolio assessment process, are developed using scientific inquiry. Step five is reading an article describing the difference between scientific inquiry and general observations, *Scientific Inquiry.*

STEP SIX

Reading the *Compare and Contrast Problem-Solving Methodologies* article is step six. The development methodology is used to develop the individual learning outcomes. The portfolio advisor and facilitating instructors need to understand how

scientific inquiry and the development methodology are used to develop the evaluation criteria for the portfolio assessment process.

STEP SEVEN

Step seven is reading the *Literature Review: What is it?* article describing the importance of the literature review to scientific inquiry. This is a similar article that the adult learner will be required to read in the BBA business research course.

STEP EIGHT

Review the *Step by Step Guide of the Post BBA Career Goal Proposal and Report Process Including the Working and Showcase Portfolios*. This is the same guide the adult learners review in the BBA342 Business Research Project I course.

STEP NINE

This step is the actual training session. The training objectives for this session include the following:

- Understand the portfolio assessment process, its components and how it is used in the BBA program.
- Understand how the Individual Learning Outcomes are developed, implemented, and fulfilled as related to the student's post BBA career goal.
- Develop a basic understanding of the following areas: scientific inquiry, literature review, and the development research methodology.

PROCURING A COPY OF THE TRAINING PROGRAM

To procure the portfolio training program for use at your institution, contact the author at the following address.

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BIOGRAPHICAL SKETCH

OF

RONALD K. BOLENDER

Ronald Bolender became the Executive Director of the Executive Center for Lifelong Learning (EXCELL) on July 1, 1995. He has been working since January 1, 1994 as a Director of Marketing and then Director of EXCELL.[1] Prior to working for EXCELL, he has held the following positions at Mount Vernon Nazarene College (MVNC): (a) Director of Retention and Academic Support Services, (b) Associate Registrar, and (c) Assistant Director of Recruitment.

He graduated from Mount Vernon Nazarene College (MVNC) in 1977 with a bachelor of arts degree in sociology. A master of arts degree in human ecology was earned at the University of Cincinnati in 1978. He was very active in student organizations while at MVNC.

He also has working experience in the business world. While living in Houston, he was first a Group Supervisor of Customer Installations and Training for Universal Computer Services and then an entrepreneur working with start-up companies. He received the Rookie of the Year award during his first year at Universal Computer Services.

He currently resides in Mount Vernon, Ohio, with his spouse, Tamara, and their sons Chadwyck (10) and Eric Chase (6). They live in a remodeled historic house that holds a growing collection of Coke memorabilia.